DOCUMENT RESUME

ED 120 213 80 TM 005 172

TITLE Operating an Objective-Referenced Testing Program: Florida's Approach to Large-Scale Assessment.
INSTITUTION Colorado State Dept. of Education, Denver. Cooperative Accountability Project.
SPONS AGENCY Bureau of Elementary and Secondary Education (DHEW/OE), Washington, D.C. Div. of State Agency Cooperation.
PUB DATE 75
NOTE 57p.
AVAILABLE FROM SEAP, Wisconsin Dept. of Public Instruction, 126 Langdon St., Madison, Wisconsin 53702 (Report No. 28, Free)

EDRS PRICE MF-$0.83 HC-$3.50 Plus Postage
DESCRIPTORS Contracts; *Criterion Referenced Tests; Data Analysis; Educational Accountability; Educational Assessment; *Educational Objectives; Elementary Secondary Education; *Guidelines; *State Programs; Testing; *Testing Programs; Training
IDENTIFIERS *Florida Statewide Assessment Program

ABSTRACT

The pros and cons of using behavioral objectives, the merits of norm-referenced versus objective-referenced tests, and the virtues of sampling versus census testing are familiar topics in evaluation literature. Far less common is practical information on how to implement objective-referenced testing, particularly the large-scale testing required for statewide testing programs. This monograph aims to partially fill the noticable gap and begin to provide practical guidance in the area of objective-referenced testing. The chapters do not cover all aspects of testing since much information is available on standardized testing. Moreover, whether a large-scale testing program uses an objective- or a norm-referenced test, testing procedures automatically become standardized due to the need for uniformity if comparable data is to be obtained. The major topics included here are accountability and product objectives, contracting, training, administration problems, and analysis of results. The text describes procedures used in Florida and, to the degree possible, the constraints and modifications of these procedures. No effort has been made to translate Florida's activities into a set of prescribed procedures, although practical suggestions are offered throughout. The monograph focuses in depth on various aspects of the Florida Statewide Assessment Program. The 1974-75 Request for Proposals (RFP) in Appendix B describes in detail the entire 1974-75 testing program, while a history provides a frame of reference for Florida's educational system and the constraints within which the program operates. (Author)

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OPERATING AN OBJECTIVE-REFERENCED TESTING PROGRAM: FLORIDA'S APPROACH TO LARGE-SCALE ASSESSMENT

2

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CAP is a seven-state, three-year project initiated in April, 1972, and financed by funds provided under the Elementary and Secondary Education Act of 1965 (Public Law 89-10, Title V, Section 505, as amended) with Colorado as the administering state.

Cooperating states are: Florida, Maryland, Michigan, Minnesota, Pennsylvania, and Wisconsin.

The activity which is the subject of this report was supported in whole or in part by the U.S. Office of Education, Department of Health, Education, and Welfare. However, the opinions expressed herein do not necessarily reflect the position or policy of the U.S. Office of Education, and no official endorsement by the U.S. Office of Education should be inferred.

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FOREWORD

Educators are confronted with a true dilemma in seeking to assess educational outcomes, especially at the state level. On the one hand is the need to know—to be sure—that expenditures are producing maximum effects. On the other hand is the desire to avoid any possible dampening of educational enthusiasm which is essential to the achievement of maximum effects.

There are those who will deny that assessment is a source of conflict. In fact, one of the barriers to the solution of assessment problems is this very insistence that the subject poses no problems.

The ultimate intent of assessment should be determining the effectiveness of an instructional program in such a way as to *increase* rather than decrease the desire of educators to identify weaknesses in student performance and to turn these weaknesses into strengths. The assessment movement may well be one of this century's most important undertakings in the continuing effort to improve education. Certainly any sound endeavor which may lead to better understanding of the learning process and a clarification of educational goals is a desirable endeavor.

With the leadership of the State Legislature and the State Department of Education, Florida has approached large-scale, statewide assessment with notable success. Moving forward in basically uncharted territory, Florida has confronted the problems of determining which educational outcomes should be assessed, what procedures can be used for effective assessment, how to involve educators on various levels in the assessment process, and how to develop and administer viable assessment instruments.

For those seeking guidelines concerning statewide educational assessment, the Florida experience with objective-referenced testing documented in this publication comes highly recommended.

Arthur R. Olson, Director
Cooperative Accountability Project

PREFACE

With the assistance of its seven participating states, the Cooperative Accountability Project (CAP) has been gathering data, developing models and publications, and disseminating information related to the expanding educational accountability movement. *Operating an Objective-Referenced Testing Program: Florida's Approach to Large-Scale Assessment* is an attempt to share with interested agencies and individuals our state's experiences, methods, and problems in instituting an objective-referenced testing program.

Florida was the first state to conduct statewide testing using instruments specifically constructed to measure educational objectives chosen by the state. In this pioneering effort, there were no proven programs and few practical guidelines to follow—either in making decisions or in foreseeing probable decision points.

This document focuses on aspects of objective-referenced testing not discussed in other materials. Our review of the procedures Florida has developed and utilized during the last four years is intended to serve as a guide in the relatively new and still experimental area of objective-referenced testing.

Judy L. Haynes

Crane Walker

CHAPTER I

INTRODUCTION

The pros and cons of using behavioral objectives, the merits of norm-referenced versus objective-referenced tests, and the virtues of sampling versus census testing are familiar topics in evaluation literature. Far less common is practical information on how to implement objective-referenced testing, particularly the large-scale testing required for statewide testing programs. This monograph aims to partially fill the noticeable gap and begin to provide practical guidance in the area of objective-referenced testing.

The chapters do not cover all aspects of testing since much information is available on standardized testing. Moreover, whether a large-scale testing program uses an objective- or a norm-referenced test, testing procedures automatically become standardized due to the need for uniformity if comparable data is to be obtained.

The major topics included here are *accountability and product objectives, contracting, training, administration problems,* and *analysis of results.* The text describes procedures used in Florida and, to the degree possible, the constraints and modifications of these procedures. No effort has been made to translate Florida's activities into a set of prescribed procedures, although practical suggestions are offered throughout.

The monograph focuses in depth on various aspects of the Florida Statewide Assessment Program. The 1974-75 Request for Proposals (RFP) in Appendix B describes in detail the entire 1974-75 testing program, while the following history provides a frame of reference for Florida's educational system and the constraints within which the state's testing program operates.

History of the Florida Assessment Program

The Florida Statewide Assessment Program was created by the 1971 Legislature. Key provisions of the act were:

1. Yearly establishment of statewide objectives
2. Assessment of student achievement of these objectives
3. Public reporting of results for the state, each district, and each school
4. Testing basic skills in reading, writing, and mathematics
5. Identification of cost-effective instructional programs

The objective-referenced assessment program was instituted on an experimental basis in 1971-72, testing second- and fourth-grade students on selected reading skills. In 1972-73, testing was changed to the third, sixth, and ninth grades, with writing and mathematics skills also tested. From 1971-72 to 1973-74, a multiple-matrix sampling technique was used which produced reliable results for the state and each district, but not for each school.

Beginning with 1974-75, a change in the Educational Accountability Act required that all students in selected grades be tested, with results reported for each student, school, district, and the state. Results will not, however, be reported by teacher. Florida has approximately 110,000 third graders, and 126,000 sixth and ninth graders.

School districts in Florida conform to county lines, a system that creates 67 school districts in the state. Since Florida's population is distributed unevenly, the ten largest districts have 67 percent of the state's students, while 39 districts have fewer than 10,000 students each.

Responsibility for Assessment Activities

Responsibility for administering the Statewide Assessment Program is assigned to the Student Assessment Section of the Florida Department of Education. The network set up for the administration of the assessment program includes the Student Assessment Section, a district coordinator for accountability in each of Florida's 67 school districts, and a school coordinator and test administrators in each school where pupils are tested. The assessment program depends heavily on the involvement of the district and school personnel to operate the program successfully and to make it responsive to the needs of individual districts and schools.

The district coordinators are selected by their respective superintendents and are responsible for conducting assessment activities within their district. They handle the distribution of materials, train the school coordinators, monitor all assessment-related activities, disseminate assessment results, and provide assistance to school personnel in utilization of data.

The school coordinator handles receipt and return of test materials, establishment of testing procedures, and training of school personnel in test administration. The test administrator reads the test instructions to the students, collects the test booklets after the students are finished, and fills in the pupil data grid on each student's test booklet.

Because so many of the responsibilities for conducting assessment are placed on the local, district, and school levels, the district coordinators frequently are asked for recommendations related to the program. Conferences for district coordinators are held twice yearly, one to critique the procedures used for the just-completed assessment, and another to review the reports on results. Input also is obtained through questionnaires and phone calls to representative districts.

CHAPTER II

STATEWIDE OBJECTIVES

In order to implement any reasonable system of accountability in education, it is first necessary to set forth the goals toward which the educational process must aim. A precise measure of performance would be meaningless apart from a statement regarding the desired performance and the ultimate results to be derived from education.

Florida's Approach to Goals and Objectives

Goals for Education in Florida were developed by Department of Education staff, adopted by the State Board of Education in 1971, and revised in 1975. They outline general, desirable skills for students in seven areas, ranging from basic to advanced learning.

One goal area concerns the mastering of basic skills required to gain and express ideas through words, numbers, and other symbols. Mental and physical health is stressed as a goal to help students acquire and maintain good health habits and emotional well-being. Relationships with other people are explored with two goals: the appreciation of the family as a social institution; and concerns for moral, ethical, and spiritual values, with application to life situations. The goal area of citizenship education is directed at improving habits and attitudes necessary for responsible citizenship. The area of occupational interests aims toward alerting students to job opportunities and developing skills and attitudes necessary to qualify them for productive work. Aesthetic and cultural appreciation as a goal area proposes that students "develop understanding and appreciation of human achievement in the natural sciences, the social sciences, the humanities, and the arts."

In setting these goals, the state defined its responsibilities in the education of its students: namely, to ensure that every child acquires essential skills, and to provide an educational system that operates efficiently and effectively.

During the same period of time, the state legislature passed the Educational Accountability Act of 1971, mandating the establishment of an accountability program for Florida which involved (1) the evaluation of pupil performance, (2) the identification of factors in the teaching-learning situation which have a direct bearing on performance, and (3) an attempt to relate the cost of these factors to learning outcomes.

By specifying that statewide objectives be focused on basic skills in reading, writing, and mathematics, the Act affirmed the principle that the state was accountable for the operation of an educational system which provided essential skills, while school systems at the local level would be accountable for programs fostering student growth in the other goal areas.

The Educational Accountability Act not only specified which subject areas would be assessed, but created immediate deadlines. (The first statewide assessment was conducted less than a year after the Act was passed.) As a consequence, there was little time for development of objectives and tests.

Development of Statewide Objectives

In late 1971, the Department of Education let contracts to various Florida universities and school districts for the development of catalogs of objectives in many subject areas--from mathematics to art to automotive engineering. The catalogs, designed for use by teachers, contained a comprehensive listing of specific behavioral objectives in the subject areas. Contractors were supervised by the Research and Development Section and by subject-area specialists within the Department of Education, with no involvement in setting specifications or evaluating products from the Student

Assessment Section. A state advisory committee of teachers and district supervisors in each subject area worked with the subject specialists to provide a broad base of input for each subject.

As the catalogs in reading, writing, mathematics, and science were completed, a small number of priority objectives for each grade level were selected for statewide assessment.[1] The state subject area advisory committees made a preliminary selection from the comprehensive list of objectives contained in the catalogs.

Through the district coordinator of accountability, each district was requested to form committees to select the objectives to be measured in the assessment program. While the membership of the committee was determined by the district, it was suggested that members might include teachers, administrators, curriculum specialists, parents, students, and other interested parties.

The district committees were instructed to select a limited number of objectives from the preliminary list for each grade level. District responses were tabulated in two ways: the total number of districts selecting an objective; and, based on district student population, the proportion of population selecting the objective.

The tabulated responses were used by the subject-area consultants and advisory committees to select a final set of objectives.[2] To insure that no important objectives had been overlooked by the advisory committees, the final lists were returned to the districts before presentation to the State Board. Upon final approval by the school districts, the objectives were submitted to the State Board and adopted as priority objectives for the state.

Problems in Selecting Statewide Objectives

Four years of experience with this method of objective development and selection have shown that the objectives have a number of drawbacks, despite the use of widespread involvement to obtain a quality product.

1. **The objectives are often so specific that they represent intermediate instructional goals rather than terminal outcomes.** Most catalogs of objectives contain every objective a teacher might need, broken down so specifically that often one objective equals a daily lesson plan. For example, in the Florida catalog of writing objectives there are twenty objectives on punctuating with commas, ranging from using commas in a series of three or more things to placing commas appropriately in the heading and salutation of an informal letter.

   While this arrangement is useful for classroom instruction, such minute objectives are too limited and specific to be practical in large-scale assessment programs. There's not enough time to test every micro-skill, but selection of only a portion means that some aspects of the broader skill won't be measured.

   Such specific objectives often represent intermediate instructional goals rather than terminal outcomes. Because the catalogs are instructionally oriented, the objectives are often broken down into units following the day-by-day sequence of instruction, rather than identifying the overall skill. Assessment of such detailed objectives provides information that is of use only to local educators, while resulting test scores have little significance for parents and legislators who often fail to see why such a skill should even be taught.

2. **There may be few or no objectives for some important skills.** Since priority objectives usually are selected from a catalog, they are dependent on and limited to the contents of the specific catalog. Because of time and budgetary limitations, the catalogs seldom are truly comprehensive. Moreover, the organization of the catalog and the relative number of

[1] The catalogs of objectives are considered a teaching resource, not a mandatory curriculum. Statewide objectives are established only for the subject areas and grades participating in assessment.

[2] Note that the process of objective development and selection was done entirely by subject-area curriculum specialists and district advisers. Testing and assessment specialists received the objectives only as a "final product," presumably ready for item development.

objectives in various categories reflect the instructional bias of those who develop the catalogs.

Objectives often are written to describe what the curriculum ought to be, rather than what it is. Thus, a catalog may represent goals that the developer wishes to see adopted, rather than those toward which the system has been working. While such changes may be educationally desirable, assessment based on these new objectives will not be a valid measure of the effectiveness of the current program.

While the catalog is, justifiably, an instrument for introducing curriculum change, selection of objectives from that catalog biases the assessment results of a system not yet geared to meet the new, proposed goals. Such objectives provide good baseline data against which future improvement may be measured, but they do not yield an accurate picture of the effectiveness of the educational system. For example, Florida's science catalogs emphasize a process approach to science which most districts have not yet implemented fully, and assessment results based on these objectives were very low.

3. **Some objectives are duplicated across subject areas, yet the commonalities too often are ignored.** Many skills are important to more than one subject area. For example, vocabulary skills are included in both the reading and writing catalogs, measurement skills are in both mathematics and science, and library skills are included in the reading, writing, science, and social studies catalogs. Objectives for these skills tend to be very similar across subject areas, yet some subject-area specialists refuse to examine results on any objectives that did not come from "their" catalog. For instance, a writing supervisor may ignore the results of a library skill objective because it was selected originally from the science catalog.

   When selected from separate catalogs, almost identical objectives may vary just enough in wording that different test items are required. This increases the length of tests without increasing the amount of real information gained about student performance.

4. **The language and specificity of objectives often differ among subject areas.** Florida's statewide objectives are adopted by the State Board of Education and receive wide distribution throughout the state. For general understanding and agreement, these objectives must be stated with brevity, clarity, and consistency. Although all objectives were taken from catalogs produced under Department of Education supervision, they were written with marked lack of conformity and varying degrees of specificity. Some variations are merely trivial, such as "the student will identify . . ." in one subject area and "the student identifies . . ." in another. Others represent substantial differences, such as science objectives so detailed that they require seven typed lines, while writing objectives require only two or three lines. If objectives were selected from catalogs obtained from various sources, it is likely that the differences would be even greater, requiring major staff effort to produce an acceptable degree of consistency.

5. **Specificity in objective wording can hinder test development.** In developing an objective-referenced testing program, a decision must be made whether to adopt skills appropriate for a grade level (e.g., the ability to outline) or to adopt specific wordings of objectives. The Florida Statewide Assessment Program has operated thus far by having the State Board adopt specifically worded objectives. However, there are a number of drawbacks to this system. Most states cannot afford to pay for the development and review of test items for all objectives in the pre-selection group. Instead, after objectives are selected, someone is hired to write the test items or the items are purchased from an item bank. In either case, the developing agency can afford test items only for the chosen set of objectives.

   Unfortunately, however, a specifically worded objective can create problems for item development. Some objectives as worded are difficult to measure—a difficulty unhappily

discovered only when staff members attempt to write or match test items from a bank with the objectives. Moreover, a specifically worded objective dictates the form of the test item. Although there might be a format more appropriate for the grade level, or one which would serve to measure several skills in a series of items, the specificity of the objective prevents this kind of improvement in test construction.

6. **Specific objectives may be inappropriate for the grade level being assessed.** In Florida, one problem has been that the objectives are often so specific and simplistic that they end up being inappropriate for the designated grade level. For example, teachers felt it was important to test ninth grade students' ability to organize with the use of an outline. However, the only objective in the original catalog, and the one thus selected, specified that the outline be a phrase outline and that a list of the missing subpoints and details be provided so that all the student had to do was match the missing subpoints and details. Later, a task force of teachers and supervisors who reviewed the test items pointed out that this particular item was more appropriate for younger students and that ninth graders should be expected to demonstrate higher level organizational skills. However, since the specific objective had been adopted by the State Board, a more appropriate grade level could not be tested until the following year after the objectives were rewritten.

A Plan for Selection of Statewide Objectives

There are three alternative solutions to these problems. One is to adopt specific objectives, using the best development procedures permitted by time, money, and resources, and to adhere strictly to the wording adopted until redevelopment is possible. This alternative, as demonstrated by Florida's experience, has all of the disadvantages just described.

The second alternative is to adopt specific objectives, but allow the Department of Education or a small task force to make changes—not in the type of skill, but in test item form or difficulty level—basing such changes on results of a field test. For example, an objective which specified that students would be tested with an incomplete phrase outline might be changed to specify a full-sentence outline. The disadvantage of this alternative is that the objective assessed is not the exact one that people throughout the state selected, a factor that could lead to distrust of the assessment process. A second concern is whether the Department of Education staff or a task force is really qualified to make such decisions.

The third alternative is to adopt skills rather than specific objectives. For testing at ninth grade level, the objective statement on outlines might read: "The student constructs simple outlines." During the objective selection process, this statement would be accompanied by a description of the minimum and maximum limits of what is expected of students at a particular grade level. For example, there would be no more than 20 items in the outline; for the sixth grade, it would be only a phrase outline, while for ninth grade it might be a full-sentence outline. Consequently, teachers would have input into reasonable minimums and maximums.

As in the example concerning outlining, the state-adopted objective would not be phrased in terms of what the test item should be ("identify," "select," or other skills amenable to multiple-choice items) but in terms of the ultimate educational goal. Emphasis would be placed on skills that teachers are working to develop in their students, since teachers are not restricted by the limitations of multiple-choice testing. Thus, if the actual terminal skill desired is that the student be able to create his own outline, that would be the wording adopted. If the constraints of testing force the use of multiple-choice items, the most appropriate test item can be constructed in keeping with a description of limitations. In either case, the state no longer has to limit its goal by such narrow specifications as "given an incomplete outline, the student identifies the missing subpoints." However, an auxilliary list of such objectives and sample items sent to teachers might well be useful.

Since, under this system, only general skill statements would be adopted by the State Board, test writers would have some flexibility in creating a good test item; yet the end product would not be con-

trary to the minimum and maximum limits of difficulty accepted through the review process. At the same time, the adopted objectives are simple and clear, a particularly important point since the primary purpose of public priority objectives is to communicate to everyone—including parents and legislators—what students should be learning.

During 1975, Florida will undertake a new procedure to develop statewide objectives, incorporating the characteristics of the third alternative described, with the procedure designed by and under the direct supervision of the Statewide Assessment Program staff. The proposed procedure will include appointment of an advisory committee, with representation from parents, the legislature, business, and the Florida Education Association, among others, which will identify "the essential skills every child should have in order to function effectively in society." These desired terminal outcomes will be an operational definition of functional literacy and will be compatible with, but more detailed than, the original *Goals for Education in Florida*.

The terminal outcomes then will be analyzed by subject-area specialists, working on special contract, to determine what prerequisite skills are involved in acquiring the terminal skills and by what approximate age/grade level each prerequisite should be acquired. Committees in each district will be utilized to verify the completeness of the objectives and their appropriateness for the selected grade levels. After district review, the skills will be adopted as statewide objectives for given grade levels. Student progress toward achievement of these terminal objectives will be measured at three to five different grade levels.

CHAPTER III

CONTRACTING

When large numbers of students are to be tested, and/or departmental facilities are limited, contracting for some or all of the operational activities of the testing program becomes desirable. For the past four years, Florida has contracted with a major testing company for the following activities:

1. Review of items supplied by the Florida Department of Education
2. Formatting of tests
3. Development of manuals for test administrator, school coordinator, and district coordinator
4. Field testing (added in 1974-75)
5. Designing all other forms and materials needed (shipping notices, etc.)
6. Printing and distributing all materials to districts
7. Preparing training materials for Department and district coordinator use
8. Receiving all material after testing, including follow-up
9. Scoring tests (some hand-scoring required prior to 1975-76)

10. Producing a clean computer tape of each student's responses, correctly identified by district, school, and student number
11. Preparing a final report including item analyses, review of effectiveness of procedures, and results of supplementary studies

The Florida Department of Education retained responsibility for supplying an initial set of items[3] to the contractor and for printing reports on results, as well as providing assistance in development of manuals and training materials. However, with the large student population (400,000) involved in the move to census testing in 1974-75, the Department added to the contractor's activities printing the individual student reports on objective achievement. The change was made because the contractor could return test results more quickly to the schools. The contractor can move directly from scoring to report printing and distribution on a district-by-district basis, while the Department can print reports only after receiving a complete tape of all districts—a difference of about two months.

Selection of a Contractor

The procedure used to select a contractor depends on the laws under which the education agency operates. In Florida, any contract over $15,000 must go out on competitive bid. The bids received must be for the total project, and no negotiation of price or services is allowed after bids are opened. Consequently, the State Department of Education must be very specific in outlining the responsibilities of the contractor, which it does in an extensive Request for Proposals included in Appendix B.

Florida is required to accept the lowest qualified bidder, with "qualified" determined by two factors: the bidder must have the necessary resources (personnel and facilities) to do the job; and his bid must include all activities required in the RFP. In addition, a detailed cost breakdown is required. Comparison of the quality of the proposal (the superiority of one bidder's method for a certain activity) is not an acceptable criteria in selecting the contractor.

This procedure forces the Department to decide most details of operation without the benefit of the contractor's advice or experience, although minor modifications, if mutually acceptable, can be arranged after the contract is let. Moreover, techniques which might be more cost-effective cannot be considered in selecting the contractor. Based on our experiences, the quality of each proposal should be considered in selecting the contractor, if state laws permit that consideration.

Because of the required bidding process, from 1972 to 1975 Florida's Statewide Assessment was conducted by a different contractor each year: 1972-73, Harcourt Brace Jovanovich, Inc.; 1973-74, Educational Testing Service; and 1974-75, Westinghouse Learning Corporation (WLC). WLC was later awarded the contract for 1975-76 assessment, providing the first continuity in contracted services.

The continual change required the departmental staff to direct a major effort toward educating the contractor's staff as to the requirements of objective-referenced testing in general and, more particularly, in Florida. As large-scale objective-referenced testing becomes more common, other agencies should encounter less difficulty in this area, but Florida's program was the first experience for most of the people involved.

One of the most consistent recommendations for improvement of Florida's Assessment Program—voiced alike by district personnel, the contractors, and Department of Education staff—is contracting for a three-year period rather than one year. In Florida, this will require special authorization and finalization of plans for assessment by the Legislature and the Department. So far, year-by-year expansion and redirection of the program have made it impractical to let contracts for terms longer than a year.

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[3] A separate section on item development is not included in this report, as Florida is still experimenting with alternatives for item development. Thus far, all items have been written especially for the Assessment Program. Many were written by the developers of the Research and Development catalogs of objectives; others were prepared by special task forces which reviewed and revised items in each area. As indicated above, there also was review, revision, and creation of items by the contractor. Until Florida's objectives and grade levels for testing stabilize, item development will be a problem area.

Liquidated Damages for Delay

Florida's experience has shown that tying delivery of products to receipt of payment is not always sufficient incentive to guarantee that the contractor will deliver according to the schedule established in the contract. In particular, Florida's contractors have been behind schedule in producing clean computer tapes of scored responses and in delivering the final report, both post-scoring activities. While contractors have been commendably on schedule with prior activities, including the completion of machine and hand scoring, they seem to bog down in producing the two products needed most urgently by the Department: the computer tapes of results and the final report identifying changes needed for the next assessment.

To encourage completion of tasks on schedule, our contracts now specify that $200 a day in liquidated damages may be assessed by the Florida Department of Education for every work day that any of the following products is not delivered by the contracted time: training materials, test materials, response tapes, and final report.

The specific reasons for and degree of lateness have varied, but two underlying causes seem apparent: failure to anticipate problems in the planning stages and lack of company commitment to provide necessary resources to get the project completed.

The Department requires that the final tape have the correct number of students tested per school and district; but, because of miscoding (usually at the school level), initial counts have been inaccurate. Careful planning of coding procedures and exact instructions would have reduced the number of coding errors, while greater commitment of resources (such as searching manually for missing booklets) would have resolved the problem more rapidly.

The excessive lateness of final reports (as much as five months after the agreed date) seems due to low priority assigned to the report as opposed to other projects conducted by testing companies. One possible solution, which Florida will try in the future, is to request multiple final reports—on different topics with staggered due dates—rather than one all-encompassing report. For example, the review of procedural problems encountered can be submitted soon after testing is completed while statistical analyses for the supplementary studies cannot be prepared until after all tests are scored.

Monitoring the Contract

While contracting relieves the Department of Education of much of the day-to-day work connected with the testing program, the Department still has a responsibility to monitor the contract to make sure that products and procedures designed by the contractor meet the state's needs. To maximize the effectiveness of the contracting experience, the following suggestions are offered:

1. **Don't overestimate the technical competence of the contractor's staff, no matter how prestigious the testing company is, and don't underestimate your own knowledge.** While the company's project director undoubtedly will have both experience and competence, a director usually oversees a number of testing projects which limits the amount of time he or she can devote to the details of any one program. The preparation of materials and the preliminary design of procedures usually are delegated to others, some of whom may be extra staff newly added to handle your project. Thus, it is possible that test administration manuals or training materials may be written by someone doing the job for the first time. (This has happened to Florida twice.)
2. **In developing a schedule, allow plenty of time for revision and modification** of the test format, administration and coordinators' manuals, and training materials. (Note that the schedule in our RFP is not the most desirable—more time should be scheduled if possible.) Don't expect the first product sent to you to be perfect, particularly if you have given the developers little direction as to what you want. Especially in the first year with a contractor, assume that you must review every document and do at least a partial rewrite, followed by revision by the contractors and, finally, a second review by your staff.

3. **Meet with the contractor several times.** In an era of tight travel budgets, there is strong temptation to rely on phone calls and letters. It is Florida's experience that the project runs more smoothly and the Department of Education is more satisfied with the results when contractor and Department staff meet at critical times. Contractor and Department staff should divide travel requirements, each meeting on the other's home territory during the year. Meetings scheduled at any or all of the following decision points are recommended:

   (a) **Beginning of contract.** Department contacts travel to contractor to meet all staff who will work on the project.

   (b) **Review of field test results.** Department's subject-area consultants review items with contractor's staff.

   (c) **Planning or reviewing operational procedures.**

   (d) **Planning training materials.** Work session between Department staff member who will conduct training and the contractor's staff who will write the material.

   (e) **Review of final test format (or other products).** Meeting can save one to two weeks in production time.

   (f) **Training sessions.** Contractor should have a representative in attendance at each training session.

   (g) **During scoring.** Department staff checks contractor's scoring operation and agrees to final details of receiving and follow-up.

   (h) **At meetings for district coordinators.** Florida holds two statewide meetings for all district coordinators, one to discuss reporting and provide training for the next assessment, and another to critique the just-completed assessment. The contractor should attend both.

CHAPTER IV

TRAINING

An assessment program designed to test students throughout the state will involve not only Department of Education staff, but also those persons at the district and school level who will be responsible for receiving and administering test materials. Because it is not feasible for the Department to have direct contact with everyone involved in testing, a communication network is needed.

The Florida Statewide Assessment Program has one representative from each of the 67 districts in Florida who is chosen to serve as coordinator for the program in his district. Each district coordinator of accountability is named by the district superintendent, not by the Department of Education. In general, assessment is considered one of the appointed individual's job responsibilities. Since the same people usually serve as coordinators year after year, they provide continuity to the program.

The district coordinator is responsible for all activities of the assessment program within his or her district. Specific duties include disseminating information concerning the program, including test results; receiving, distributing, and collecting test materials; and monitoring the testing procedures used by schools.

Since the district coordinator personally cannot administer the tests to all students, each coordinator is responsible for training those who will be in charge of the district's test administration. The district coordinator arranges for the appointment of a school coordinator at each school to be in charge of testing. The school coordinator is assisted by test administrators, usually counselors and/or teachers.

Districts and schools develop their own testing plans to coincide with the statewide assessment period (usually three weeks for testing and make-up). They also determine whether students will be tested in large groups or in their own classrooms.

Training Sessions

Assessment training is a multi-step operation. The Department of Education provides training sessions to the district coordinators; the district coordinators train the school coordinators; and training of test administrators is conducted either by the district or school coordinator. From 1972 to 1975, the Department held five to seven training sessions in different regions of the state, with district coordinators attending the closest session. Since 1975-76 testing was moved to the fall, training workshops were combined with an annual August meeting of coordinators.

These training sessions are conducted by Department of Education staff, with one person from the contractor's staff present to provide technical consultation. Florida has tried having the contractor conduct the training sessions, but because Department staff are acquainted with the coordinators, the needs of the various districts, and the procedures and problems previously encountered, they can better adapt training to the specific audience.

The sessions conducted by the Department have a dual focus: addressing the tasks to be performed by the district coordinators and providing them with the information and materials necessary to conduct their own training sessions.

Training Materials

While the contractor is responsible for producing the training materials, planning for the training sessions is performed jointly by the Department of Education staff and the contractor at a two- or three-day work session. The materials needed include training manuals for test administrators as well as school and district coordinators; transparencies; a script; and handouts for the training sessions. In

order to maximize the effectiveness of the training sessions, training materials are sent to the district coordinators one to two weeks before the training sessions. This allows the coordinators time to familiarize themselves with the proposed procedures and to identify potential problem areas.

The requirements for training materials are noted in the Request for Proposals (Appendix B, pp. 29-52). However, two additional comments are offered:

1. **The district coordinator must have exactly the same materials as his subordinates.** Uniformity of page numbers, color of paper, and location of information on the page can be critical when people are trying to solve problems over the telephone. This caution also applies to forms which must be completed; if at all possible, manuals should include the actual form rather than a copy or an example.
2. **Examples used in training materials must be complete.** For example, if the names of all third graders in the school are to be listed on a form, at least one completed sample page should be included. Additionally, the material should include clear instructions covering all circumstances that can possibly be foreseen.

Evaluation of Training

Effectiveness of the training sessions and materials is evaluated by the contractor. As a basis for this evaluation, questionnaires and/or interviews are administered to participants, and records are kept of instances in which specified procedures were not followed. The contractor provides a summary of all feedback, together with recommended changes in training procedures and materials. In addition to the contractor's evaluation efforts, district coordinators meet twice a year, with one meeting scheduled immediately after testing to critique the procedures and materials employed.

CHAPTER V

TESTING PROCEDURES

The Testing Population

In conducting any kind of testing program, one question of particular importance to those within the schools is "Which students will be tested?" This question applies to the number and kind of students, as well as to grade and/or age levels.

The question of which students to include in testing is directly related to the purpose of the testing program and so is usually decided by those responsible for designing the program. However, the answer has primary impact at the school level since school personnel must administer the tests to all students designated by the "higher-ups" and then explain the results. Thus, while the design of the testing program might call for all elements of the student population to be tested, school officials may request the exclusion of students who are physically, emotionally, or culturally handicapped. Three groups of children represent particular problems: special education students, non-English speaking students, and migrant students.

Special Education Students. Florida officially recognizes 13 categories of special education students, including the physically handicapped, mentally retarded, emotionally disturbed, speech impaired, and gifted. Classification of special education students is a district function, so there is considerable variation in standards used. Some school officials have asked for the categorical exemption of all special education students—except the gifted.

Non-English Speaking Students. Florida has a relatively high proportion of Spanish-speaking students, some of whom speak no English and so find Statewide Assessment tests (completely in English) a defeating experience. The state also has heavy concentrations of other non-English speaking populations, including Greek and Vietnamese. These students are part of the population for whom the state educational system has a responsibility to provide at least minimum skills. If they are excluded from the testing program, test results will show a higher degree of success with minimum skills than actually exists. Moreover, it is extremely difficult to establish a standard definition of "non-English speaking" that could be applied uniformly by test administrators throughout the state. Consequently, until the 1975-76 assessment, language difficulty was not considered a valid reason for exemption from testing. At that time, the policy was modified to allow the exemption of students who had been enrolled in an English-speaking public school for less than two years.

Migrant Students. Certain Florida districts have large migrant populations who attend schools in a number of districts during the year. Although these students are included in the test results, the school and district usually have not had the students long enough to provide them with substantial instruction. Consequently, districts would like to limit testing to students who have been in the district a minimum period of time—preferably, at least two or three months. However, because the state's educational system is responsible for migrant as well as nonmigrant students, schools still are instructed to test all students enrolled at the time of testing.

Official Policy on Selection. In determining which students, if any, were to be excused from testing, the Florida Department of Education considered the following factors:

1. If the state-adopted objectives are appropriate educational goals for a student, the student should be measured on achievement of these skills.
2. The Statewide Assessment instruments are group-administered under time limits designed to allow most students to complete the test. However, the time limits are not sufficient for students with severe visual or motor (writing) limitations, nor is the test designed for blind or deaf students.

3. An analysis of the statewide priority objectives indicates that these objectives are not appropriate for mentally retarded students.
4. School officials requested that students classified as socially maladjusted or mentally disturbed be excused from testing because they disrupt the testing situation and/or because the strain of the testing situation could be psychologically damaging to the child.
5. School officials requested that students unable to speak English be exempt from testing because such children's achievement (or lack of achievement) most often was not attributable to the public school system.

After considering these factors and discussing related questions with an advisory committee of district coordinators, the Department developed the following policy concerning who is to be tested for 1975-76 assessment:

> Essentially, all students enrolled in the third and sixth grades are to be tested because the test is designed to measure priority skills which all Florida students should acquire. For ungraded schools, testing should involve those students in their third or sixth year of school without kindergarten or their fourth or seventh year of school with kindergarten.

Exemption from Testing

> Exemption means that, prior to testing, a student is removed from the list of those to be tested. Exempt students do not participate in testing, so other arrangements must be made for them during the testing period.

Official Exemptions

> All students officially classified as Educable Mentally Retarded (EMR), Trainable Mentally Retarded (TMR), Profoundly Mentally Retarded (PMR), or blind are exempt from testing. For testing purposes, officially classified means *eligibility* for placement in a special program. The student may or may not actually be placed in a special program. Further definition of exceptional students may be found in *1975 Guidelines, District Procedures for Providing Special Education for Exceptional Students,* a Florida Department of Education publication.

Individual Exemptions

> Other students may be exempted on an individual basis if the school coordinator and principal agree that the student should not be tested and one of the following conditions is met:
>
> 1. The student has been enrolled in an English-speaking public school for less than two years.
> 2. The student is officially classified as an exceptional student (e.g., deaf, emotionally disturbed) and test results would be an invalid representation of achievement because of physical or emotional inability to function well under the testing conditions.

3. The student has a temporary physical disability (e.g., broken arm) which would substantially handicap test performance.
4. The student has a temporary emotional problem (e.g., recent death in the family) which would substantially handicap test performance.

(Note that a child may not be exempted from testing because of cultural deprivation or inability to read. Students classified as learning disabled may be exempted only if their disability is compounded with one of the conditions specified above.)

All students who have not been exempted according to these guidelines are to participate in the 1975-76 Statewide Assessment.

Grade/Age Levels

The selection of grade/age levels for testing depends on what kinds of data are wanted and how they will be used. If the decision is not to test every grade, then the question is, "At what grade levels do you test?" Florida operates under a mandate that assessment results will be used in the school accreditation process, and testing at grades three, six, and nine maximized the number of schools on which assessment data could be provided. More recently, changes in the Educational Accountability Act require assessment of all students in grades three through six, with the option to test other levels. Such changes directly reflect the Florida Legislature's concern with the effectiveness of elementary instructional programs.

A related question is whether to use grade, age, or some combination of grade and age to define the students to be tested. At the time Florida first began objective-referenced testing, it was argued by some that adopting objectives by grade would perpetuate the idea that all students move at the same rate. Proponents of this argument insisted that objectives be adopted by age, ignoring the fact that this system, too, implies uniform progression. However, for its first two years of operation, Florida adopted objectives for students aged eight, eleven, and fourteen.

District coordinators cautioned the Department of Education that it would be extremely difficult to identify the students to be tested if they were defined by age because most schools did not keep files in such a way that a list of all students eight, eleven, or fourteen years old could be compiled easily. The problem was compounded by the fact that often a school might have only a handful of students in the age group to be tested which poses difficulties for sample design and test administration. Because of these problems, the corresponding grades (three, six, and nine) finally were used to define the testing population rather than age or an age/grade combination. Since 1973-74, objectives have been adopted by grade. The number of years in school is used to identify the testing population in nongraded schools.

CHAPTER VI

ANALYSIS OF RESULTS

Florida's contractor is required to deliver an accurate tape containing the scored results for each student, identified by county and school numbers. Using this tape and an objective-item correspondence table which shows what items measure each objective, a series of reports are prepared.

Units of Analysis

The primary units of analysis are the student, the school, the district, and the state. No analyses are performed on a teacher or classroom level; in fact, the Department of Education collects no data which would match student results to a particular teacher.

Special analyses can be performed on age, race, native language, or migrant status, as information on each of these areas is collected for every student. The primary use of this information is in performing item analyses on a statewide basis to examine cultural bias, although information on migrant student performance has been used to identify instructional needs for migrant education programs.

Kinds of Data Provided

Most of the data provided by the Florida Statewide Assessment Program is objective-referenced although, beginning in 1975, some percentile and predicted scores also will be provided.

Criterion-Referenced Data

Florida makes a distinction between objective-referenced and criterion-referenced reporting. Initially, the assessment program was criterion-referenced, with the major thrust of the analyses geared at translating student responses into a determination of mastery or nonmastery of each objective. A task force in each subject area set the criteria of achievement for each objective (for example, that four of the five items measuring a particular objective should be answered correctly). If the student equalled or exceeded the required number of correct responses, he was considered to have achieved the objective.

The primary unit of reporting was the percentage of students achieving each objective, with percentages reported for the school, the district, and the state. Student reports were not issued because only a random sample of students in each school participated in testing. The layouts for the 1973-74 school and district reports were similar to the layout for the 1974-75 report shown in Table 1, but provided only a single score for each objective.

To avoid "teaching to the test" and exhausting our limited supply of items, the items used in assessment from 1971 thorugh 1974 were not released for any other purpose. All test booklets were to be returned to the contractor, and he was required to make a strict accounting of materials.

Although the Department prepared detailed reports which described the kinds of items used in the assessment, school personnel indicated that, to do a thorough job of analysis, they needed to work with the actual items and the results on each item. Concern also was expressed, both in the districts and within the Department, about the validity of the criteria for achievement set by the task forces. Consequently, the Department began reporting results for each assessment *item* in 1974-75, with copies of the test booklets made available on a limited basis in each school.

Objective-Referenced Data

Although results now are reported on the basis of the percentage of students achieving an item, rather than an objective, all reports still are objective-referenced. Results are organized by objective, as shown in the 1974-75 School Report (Table 1). Separate computer reports are generated for each school and sent to the district coordinator for dissemination within the district.

TABLE 1

FLORIDA DEPARTMENT OF EDUCATION
STATEWIDE ASSESSMENT PROGRAM
1974-75 SCHOOL REPORT

Assessment Results for Sixth Grade Mathematics

District 39—Liberty School 0031—Bristol Elem School

Number of Students in	
School	47
District	70
State	336

Objectives and Corresponding Items	Item #	Percentage Correct School	District	State
01—Match numeral to word name.				
	01-123	89.1	88.4	76.9
	01-124	89.1	88.4	82.6
	01-125	45.6	50.7	38.0
02—Use relation symbols between two whole numbers.				
	02-126	82.6	86.9	80.8
	02-127	82.6	88.4	75.4
	02-128	80.4	85.5	72.4
03—Round whole numbers to the nearest hundred.				
	03-129	86.9	86.9	56.5
	03-130	67.3	66.8	46.1
	03-131	73.9	75.3	50.8
06—Add 2 or 3-digit numbers without regrouping.				
	06-132	91.3	92.7	85.3
	06-133	95.6	97.1	91.9
	06-134	91.3	92.7	87.4
	06-135	91.3	89.8	85.0
07—Add up to 6-digit numbers with regrouping.				
	07-136	86.9	89.8	81.7
	07-137	84.7	86.9	80.5
	07-138	86.9	88.4	77.2
	07-139	91.3	91.3	79.6
08—Subtract two numbers when the largest is less than 19.				
	08-140	84.7	86.9	87.4
	08-141	89.1	91.3	87.7
	08-142	91.3	92.7	87.7
	08-143	84.7	86.9	90.1
09—Subtract up to 4-digit whole numbers with regrouping.				
	09-144	89.1	92.7	89.2
	09-145	93.4	89.8	80.7
	09-146	91.3	85.5	62.2
	09-147	89.1	88.4	67.6
11—Multiply using numbers 1 through 9.				
	11-148	95.6	97.1	89.2
	11-149	89.1	89.8	82.3
	11-150	97.8	95.6	85.6
	11-151	95.6	94.2	81.1
	11-152	95.6	95.6	82.3
12—Multiply up to 5-digits by a 2-digit factor.				
	12-153	93.4	86.9	68.5
	12-154	76.0	66.6	44.0
	12-155	86.9	85.5	71.2
	12-156	82.6	76.8	58.6

At the student level, the report (Table 2) shows the number of items measuring the objective, the number of items answered correctly, and the pattern of correct and incorrect responses so that the teacher can identify exactly which item(s) the student missed. This student report is printed by the contractor to minimize turnaround time. Feedback indicates a high level of teacher satisfaction with the data and the particular format of the report.

Other Kinds of Data

In order to meet the need expressed by legislators for a single measurement score which would provide information on the relative effectiveness of a district or school, Florida Statewide Assessment is developing regression formulas which will allow a comparison of the total score on an entire test and on each subject area, along with a predicted score for the school or district based on non-school variables. This analysis will take into consideration such factors as socioeconomic level, yet still provide legislators with a concise indicator of school effectiveness. The scores will be distributed for the first time in the fall of 1975.

A second need for a single score is expressed by parents who want to know how their child compares to others. To answer this question, the Department is calculating state percentile distribution based on the total test score and the total scores for each subject area. This information will be supplied to districts in the form of computer-printed gummed labels and listings.

TABLE 2

GRADE 6

FLORIDA STATEWIDE ASSESSMENT PROGRAM 1974-5 STUDENT REPORT

68 1234
WENDOVER ELEMENTARY

NAME	BIRTHDATE	SEX	RACE	LANG.	MIG.	DISTRICT DATA
GURNEY JEAN L	04/29/63	F	WHITE	ENG.		

MATHEMATICS OBJECTIVES

		# Items For Obj.	# Items Correct	Item Achievement Record
1.	Match numeral to word name.	3	3	XXX
2.	Use relation symbols between two whole numbers.	3	2	XX-
3.	Round whole numbers to the nearest hundred.	3	2	XX-
6.	Add 2 or 3-digit numbers without regrouping.	4	4	XXXX
7.	Add up to 8-digit numbers with regrouping.	4	4	XXXX
8.	Subtract two numbers when the largest is less than 10.	4	4	XXXX
9.	Subtract up to 4-digit whole numbers with regrouping.	4	4	XXXX
11.	Multiply using numbers 1 through 9.	5	4	X-XXX
12.	Multiply up to 5-digits by a 2-digit factor.	4	4	XXXX
13.	Divide numbers up to 81 evenly using numbers 1 through 9.	5	5	XXXXX
14.	Divide up to 5-digits evenly by a 1-digit divisor.	4	4	XXXX
15.	Divide up to 5-digits evenly by a 2-digit divisor.	3	1	X--
16.	Identify fractions as points on a number line.	3	3	XXX
17.	Identify fraction greater, less, or equal to a given fraction.	3	1	--X
18.	Identify a fraction equivalent to a given proper fraction.	4	1	--X-
20.	Identify fractions equivalent to decimals up to .98.	2	0	---
21.	Add fractions with like denominators with sums less than 1.	3	3	XXX
22.	Subtract fractions with like denominators.	4	4	XXXX
23.	Add decimal numbers named in tenths.	3	2	XX-
24.	Solve addition word problems with sums less than 100.	3	3	XXX
25.	Solve subtraction word problems with sums up to 100.	3	3	XXX
26.	Solve multiplication word problems with products up to 81.	3	3	XXX
30.	Solve addition or subtraction word problems involving money.	3	3	XXX
31.	Determine change to be received after purchases.	3	1	--X
32.	Identify data in a diagram of graph.	2	2	XX
33.	Solve word problems by finding averages.	3	0	---
34.	Label geometric shapes.	4	3	X-XX
35.	Tell time from clock face.	3	3	XXX
37.	Place units of liquid measure in order by size.	3	3	XXX
38.	Convert feet and inches to inches and vice versa.	2	0	--
39.	Select situations illustrating concept of perimeter.	1	1	X
40.	Select situations illustrating concept of area.	1	0	-
41.	Compute the perimeter of a polygon.	1	0	
42.	Compute the area of a square or rectangle.	2	0	--

TOTALS Mathematics: 80 Items correct of 106
Total Test: 165 Items correct of 221

Note: X means item is correct. - means item is wrong.

GRADE 6

FLORIDA STATEWIDE ASSESSMENT PROGRAM 1974-5 STUDENT REPORT

68 1234
WENDOVER ELEMENTARY

NAME	BIRTHDATE	SEX	RACE	LANG.	MIG.	DISTRICT DATA
GURNEY JEAN L	04/29/63	F	WHITE	ENG.		

COMMUNICATION SKILLS OBJECTIVES

		# Items For Obj.	# Items Correct	Item Achievement Record
1.	Identify words containing the long /a/ sound as in bait.	2	1	-X
3.	Identify words containing the schwa sound as in around.	2	0	--
6.	Identify words containing the /f/ sound as in phone.	2	2	XX
8.	Identify the correct plural form of a singular noun.	4	4	XXXX
9.	Identify the correct possessive form of a noun.	3	2	XX-
10.	Select a prefix or suffix so root word fits sentence context.	4	3	XXX-
12.	Identify phrases which tell who, what, when, where, why, how.	5	5	XXXXX
13.	Select a synonym for a given word in a sentence.	3	3	XXX
14.	Select an antonym for a given word in a sentence.	3	0	---
15.	Identify the meaning of heteronyms from sentence usage.	4	4	XXXX
16.	Identify meaning of multiple-meaning word from sentence context.	2	1	-X
17.	Indicate whether sentences have the same or different meanings.	2	2	XX
18.	Identify sentence in which punctuation gives desired meaning.	2	0	--
19.	Identify the main idea of a paragraph.	1	0	-
20.	Select the best summary for a selection.	1	0	-
21.	Identify details which appeared in a selection.	3	2	XX-
22.	Identify from a selection the cause or effect.	2	2	XX
23.	Identify most logical conclusion to be drawn from a selection.	1	1	X
24.	Select best description of a character in a selection.	1	0	-
25.	Identify appropriate ending for an incomplete analogy.	3	2	-XX
26.	Identify the irrelevant statement in a selection.	1	1	X
27.	Select subtopics which support a given topic.	2	0	--
28.	Distinguish statements of fact from statements of opinion.	5	4	XX-XX
29.	Arrange sentences in a logical sequential order.	5	2	---XX
30.	Determine the order in which directions must be performed.	3	1	X--
31.	Alphabetize words with the same 2 or 3 beginning letters.	5	3	XXX--
32.	Select guide words found on same dictionary page as entry word.	3	2	XX-
33.	Locate information through the use of a table of contents.	3	3	XXX
34.	Locate information through the use of an index.	2	2	XX
35.	Select directions which describe location of places on map.	3	3	XXX
36.	Select the best summary of the information in a table.	1	1	X
37.	Identify the conclusion supported by data in a bar graph.	1	1	X
38.	Distinguish complete sentences from sentence fragments.	4	4	XXXX
39.	Combine 2 related simple sentences into one sentence.	3	3	XXX
40.	Write a topic sentence appropriate for a given paragraph.	1	1	X
41.	Write a paragraph story based on a series of pictures.	1	1	X
44.	Punctuate sentences with commas.	5	3	--XXX
45.	Identify the words in a letter requiring capitalization.	5	5	XXXXX
46.	Select correct use of pronouns.	3	3	XXX
47.	Select correct subject-verb agreement.	3	2	XX-
48.	Identify sentence using correct verb form.	3	3	XXX
49.	Write appropriate greeting and closing for a friendly letter.	3	3	XXX

TOTALS Comm. Skills: 85 Items correct of 115
Total Test: 165 Items correct of 221

Note: X means item is correct. - means item is wrong.

APPENDIX A

TECHNICAL SPECIFICATIONS

SPECIFICATIONS FOR OBJECTIVES

In Florida, each objective selected for assessment must meet these criteria:

1. It communicates to public as well as educational audiences. If a choice must be made between technical accuracy and understandability, the latter shall prevail.
2. It is directly related to achievement of the state-adopted Goals for Education.
3. It identifies a skill which most individuals will accept as having value in and of itself.
4. It identifies a terminal outcome rather than an intermediate instructional objective.
5. It is stated in behavioral terms, avoiding words such as "know" and "value."
6. It uses verbs which describe application of the skill in real life rather than testing situations (for example, "adds correctly" rather than "identifies the correct sum"; "uses correct grammar" rather than "selects the grammatically correct sentence").
7. It refers to a general class of activities rather than to a specific activity (for example, "supplies information needed on common forms" rather than "completes a driver's license application").
8. It is accompanied by a set of specifications which identify the minimum and maximum difficulty levels appropriate for specific grade levels.

SPECIFICATIONS FOR ITEM FIELD TESTING

To meet the purposes of statewide assessment, tests which measure selected objectives must be developed. The test must be standardized in order to permit comparison of scores among schools. (Standardization is defined in relation to the uniformity of administrative procedures, time, and scoring.)

Certain technical information must be known about the items or exercises* used in assessment, specifically:

1. **The stability of the items.** Will students respond in the same way to the same items at different times?
2. **The content validity of the items.** Does an exercise really measure the content of the specified objective, and does the set of items in the exercise adequately sample the area of skills identified in the objective?
3. **The "criterion" validity of the exercises.** Is each item in an exercise written at the appropriate level of difficulty for the population being tested?
4. **The cultural validity of the exercises.** Does an exercise work equally well for subpopulations in the state, or are modifications needed for certain subpopulations?

To meet the needs for standardization and technical quality, it will be necessary to conduct field tests and research studies on assessment exercises prior to their utilization on a statewide basis. The field tests should be designed to determine the following:

1. The adequacy and completeness of directions for administering test exercises
2. Which exercises can be administered in the same sitting with the same directions
3. The length of time each exercise requires, including reading directions and obtaining a student response
4. Student reaction to items. (This may require asking students about ambiguity of stimuli and response choices, accuracy of response choices, and clarity of directions.)
5. The adequacy and accuracy of scoring keys

* An exercise consists of all items measuring a single objective.

6. Estimated scoring time for each hand-scored exercise
7. Estimated reliability coefficients of exercises, or an acceptable substitute of reliability, such as coefficient of "generalizability" over time. (This will require administration of exercises to students on two different days at least two weeks apart.)
8. Estimated "cultural" validity for each exercise. (This will require administering exercises to various subpopulations. If the exercise is inappropriate for a particular subpopulation, an alternative exercise should be developed and field-tested.)
9. Item difficulty and discrimination, and an analysis of multiple-choice responses. (For objective-referenced testing, information that can identify negatively discriminating items seems valuable in making final decisions about items. Equally valuable in making a final choice is assessment of the difficulty of the item and analysis of multiple-choice responses. However, the statistics should not dictate automatically the item's fate. For example, an item with low discrimination and difficulty, such as 90 per cent achievement, still might be kept because of its content validity.)
10. Estimated criterion validity for each exercise. (This can be determined in a variety of ways. One is to identify a group of students who already have achieved the objective, either by selecting students at a higher grade level; giving students special instruction related to the objective; looking at scores on teacher-made or commercially available tests; or other subjective means, such as teacher judgment. If these students consistently can answer the proposed items, the items can be considered valid measures of the objective.)

SPECIFICATIONS FOR TEST ITEMS

1. Items must measure the selected minimum objectives.
2. At least four parallel, equivalent items must be developed for each objective.
3. A list must be provided to relate each test item to the objective it is intended to assess.
4. A scoring key must be provided with each item, and the key must be "objective" so that agreement on correct and incorrect responses is possible.
5. Items must be machine-scorable. Items designed for grade four and above must be appropriate for use with a separate answer sheet.
6. Items must be designed for group administration.
7. General administration and timing instructions must be included for each item.
8. Where feasible, the amount of time required to read the directions and answer each question should be indicated for each item.
9. The instructions for each item should be as short and simple as possible so the proportion of total testing time spent in reading directions is minimal.
10. Where possible, the same set of instructions should be applicable to items pertaining to different objectives.
11. Items must have content validity determined by experts in measurement and in the subject area being measured.
12. Items must be field-tested to determine measurement quality; that is, an item should be free of ambiguity, have explicit instructions for administration, require a reasonable completion time, and allow for objectivity of scoring.
13. All items developed will be the property of the State of Florida, and security for all items must be maintained; for example, no general release of *any* items may be made by the contractor.

TEST CONSTRUCTION CONSTRAINTS

The test format should give students the best possible opportunity to answer all items and to get the right answers. Factors involved include:

1. All items for an objective will be consecutive, except for reading comprehension where questions on one reading selection measure different objectives.
2. Exercises need not appear in the same sequence as objectives, but they should not be scrambled just to avoid that sequence. The primary concern should be overall test format.
3. Take advantage of "test-taking set" by putting similar types of items together.
4. Avoid monotony or a long set of items of extreme difficulty.
5. Within each sitting (timed portion of the test), test items should move from easy to hard items to increase the likelihood that the student will get to all those he can answer. Placing hard items first can be discouraging.
6. Place items requiring written responses together for ease of scoring. Do not place them at the end of a long session when students are tired.
7. Place all items which have more than one correct response together. Have the test administrator read directions that emphasize the possibility of multiple correct answers. Also, have administrators read directions at the beginning of the next set of test items to indicate that multiple-response is no longer applicable.
8. Allow plenty of space for students to write responses.
9. Use blank space between test items to improve readability.

INSTRUMENT FIELD TEST SPECIFICATIONS

The field test of statewide assessment instruments has a number of purposes:

1. To provide information on the quality of individual items and exercises
2. To determine whether appropriate time has been allotted for the number of items in each sitting and to indicate what kinds of adjustments are needed
3. To check the clairty of directions to students
4. To check the accuracy, completeness, and clarity of administration manuals

To accomplish these things, Florida envisions a field test within the following constraints:

1. At least three administrators and 50 students will respond to each form. A multiple-matrix technique may be used as long as each section of the test is given by at least three administrators to 50 students.
2. The field test instrument will be assembled in the sequence and under the constraints identified for the final test.
3. The test will be assembled in sittings and sections within sittings, with breaks included. If a multiple-matrix technique is used, sections will be used intact.
4. The anticipated amount of time needed per section will be identified in the administration manual as well as proposed completion time for paced items.
5. During the field test, the time required for each student to complete each section will be recorded. If items are of a paced dictation nature, the administration manual will indicate a proposed time per item, but the field test should provide means for evaluating adequacy of that time.

6. The field test instrument may be assembled with one exercise per page to facilitate modification later.
7. Administration manuals should be prepared in as final a form as possible, including general directions, etc.
8. After field tests, all administrators and at least a sample of students should be asked for comments on the test, materials, items, directions, amount of time, etc.

PRINTING AND LAYOUT SPECIFICATIONS

1. The Florida Department of Education will approve printing specifications, including type size, ink color, paper, and general layout to be used. The type size for each grade shall be no smaller than shown in the attached examples. Headline and body type size shall be proportional and approved by the Department.
2. In typesetting items, the arrangement or format of individual items shall not be modified without approval from the Department; e.g., an arithmetic exercise in columnar form $\begin{array}{r} 2 \\ +\,4 \end{array}$ shall not be changed to linear form (2 + 4 =).
3. Work space shall be provided in the test booklet beside appropriate items.
4. Art work supplied by the Department shall be used in the size indicated by the Department; art work may not be reduced in size without Departmental approval.
5. All items for an objective should be on the same page and, unless there are too many items to fit in a single column, all items should be in the same column. An exercise which extends into a second column should begin at the top of the first column.

THE PRINT SIZE SHOULD BE NO SMALLER THAN THE EXAMPLES SHOWN BELOW.

In 1953, the sabal palm was named the state tree of Florida. The sabal palm is the most widespread of all the palms native to Florida. Its range extends from the West Indies, through Florida, and on into North Carolina. The sabal palm has been known to reach a height of eighty feet. It has large yellow-green fans, a yellowish-gray bark, and large sprays of small yellow flowers that spring from the center of the foliage. The tree produces fruit in the form of small black berries that are used in the manufacture of certain medicines.

3RD GRADE
120% magnification
of original

In 1953, the sabal palm was named the state tree of Florida. The sabal palm is the most widespread of all the palms native to Florida. Its range extends from the West Indies, through Florida, and on into North Carolina. The sabal palm has been known to reach a height of eighty feet. It has large yellow-green fans, a yellowish-gray bark, and large sprays of small yellow flowers that spring from the center of the foliage. The tree produces fruit in the form of small black berries that are used in the manufacture of certain medicines.

6TH GRADE
110% magnification
of original

In 1953, the sabal palm was named the state tree of Florida. The sabal palm is the most widespread of all the palms native to Florida. Its range extends from the West Indies, through Florida, and on into North Carolina. The sabal palm has been known to reach a height of eighty feet. It has large yellow-green fans, a yellowish-gray bark, and large sprays of small yellow flowers that spring from the center of the foliage. The tree produces fruit in the form of small black berries that are used in the manufacture of certain medicines.

9TH GRADE
100% of
original

APPENDIX B

REQUEST FOR PROPOSALS FOR

OPERATIONAL TASKS OF 1975-76 FLORIDA STATEWIDE ASSESSMENT

NOTE: The table of contents, appendixes, and enclosures referred to in the text of this *Request for Proposals* (RFP) have been omitted. Most of the information involved is given in Appendix A of this document. Readers requiring exact details concerning the RFP appendixes and enclosures may contact the Student Assessment Section, Florida Department of Education.

PART I—TECHNICAL INFORMATION

1.0 INTRODUCTION

The Florida Statewide Assessment Program is the segment of Florida's Accountability Program responsible for assessing student achievement. The operational aspects of the Statewide Assessment Program are housed in the Student Assessment Section, Bureau of Evaluation and Compensatory Education, in the Division of Elementary and Secondary Education of Florida's Department of Education.

Cooperating with the Department of Education is a district coordinator of accountability in each of Florida's 67 school districts (each county is a district). All aspects of assessment within the district are administered through the district coordinator. Other individuals involved in assessment are the school coordinators of assessment (one per school) and the test administrators.

Although the Statewide Assessment Program has several facets, the primary thrust for 1975-76 is the administration of criterion-referenced tests in communication skills and mathematics to all students in grades three and six. Communication skills as one domain include reading and written communication. Production of objectives and criterion-referenced test items is accomplished through contracts administered by Department of Education subject-area and technical specialists outside the Student Assessment Section. Once produced, the test items are delivered by the Student Assessment Section to the Contractor for implementation.

The purpose of this Request for Proposals (RFP) is to solicit bids for the operational components of the 1975-76 Statewide Assessment Program, described in sections 2, 3, and 4.

2.0 STATEMENT OF PROBLEM

2.1 History

From 1971-72 through 1973-74, Florida Statewide Assessment tested samples of students to yield reliable results for the state and every district. Reading was tested at grades two and four in 1971-72; thereafter, assessment involved reading, writing, and mathematics at grades three, six, and nine. In 1974-75, all students in these grades were assessed.

For 1975-76, approximately 110,000 third graders and 130,000 sixth graders will be assessed on communication skills and mathematics. Although hand-scored items have been used in previous years, in 1975-76 all items will be machine-scoreable.

2.2 Overview of Activities

On or about May 15, 1975, objectives and exercises to be used in the assessment will be delivered to the Contractor, as well as preliminary directions for each exercise. The Contractor shall be responsible for formatting a single instrument for each grade utilizing the exercises provided by the Department, as well as writing administration manuals to accompany each test. The Contractor will field-test the tests and administration manuals and make any indicated modifications in items, directions, manuals, or formatting of tests.

The Offerer must consider the design, development, and production of training material for all individuals involved in assessment as part of his offering. The Offerer shall include provisions for review and/or field tryout of manuals and training materials.

The Contractor shall be responsible for designing, developing and conducting distribution and testing procedures, receipt-control, editing of response documents, follow-up, and scoring procedures. Maximum quality control shall be exercised throughout all activities so as to insure

proper delivery, security, and return of the test materials, as well as the proper administration of the materials.

The Contractor shall supply two clean data tapes containing a record for each student tested, with one tape to include the student's score on each item and the second tape to contain student performance by objective. Criteria for scoring each item will be provided by the Department in the initial delivery of exercises; development of scoring keys will be the responsibility of the Contractor. Every student record must be identified by the correct district and school number and a unique student identification number, and the total number of students tested per school must be consistent with school enrollment totals. The Offerer is encouraged to develop procedures to increase accuracy, ease, and control of data collection procedures, since previous contractors have encountered problems with batch control and a high error rate of school personnel's coding of data.

The Contractor shall design procedures such that student demographic data can be supplied by some districts on computer-data files, while others code the data on student answer sheets.

After scoring, the Contractor shall be responsible for the printing of individual student reports on forms supplied by the Department, packaging the reports by school, and shipping them to either the district or school.

The Offerer shall conduct an analysis of incorrect responses and include a procedural description of an analysis of incorrect responses. Included in this description will be the frequency of selection of incorrect multiple choice foils.

2.3 Time Schedule

The approximate time frame is as follows:

ACTIVITY	BY
Release Request for Proposals (RFP)	March 14, 1975
Written Questions Due	March 25
Answers Out	March 28
Receive Proposals by close of business (COB)	April 16
Selection of Contractor	May 1
Items Delivered to Contractor	May 15
Items Typeset	June 2
*Basic Procedural Design Completed	June 16
Draft Test Layouts & Manuals Delivered	June 16
Field Test Completed	July 1
*Final Test and Administration Manuals Proofs Delivered	July 21
*Training Materials Delivered to Districts	August 4
Training Sessions	August 11-15
*Test Materials Delivered to Districts	September 8-15
Tests Administered	October 6-24
Tests Mailed to Contractor	October 31
*Student Reports Printed	November 28
*Response Tapes Delivered	December 15
*Intermediate Report Delivered	January 5, 1976
*Final Report Delivered	February 27, 1976

* Liquidated damages (discussed in 8.3) apply to these activities.

2.4 Basic Developmental Sequence

Except where otherwise specified, the Contractor shall incorporate the following sequence of activities when accomplishing tasks defined herein:

1. The Contractor shall prepare an initial design of the product(s) and/or procedures to result from accomplishment of the task, following the requirements specified in the RFP and describing in detail the elements of each product or procedure to result from accomplishment of the task and specification of the methods by which the design shall be executed.
2. Except where otherwise specified, the Contractor shall submit five copies of the design to the Department of Education.
3. Within seven working days of receipt of design specifications, the Department of Education shall complete its review and either (a) approve the design as submitted or (b) provide specifications for the modification of the design. If modification is required, the Department of Education shall notify the Contractor of the need for submission of any modified design for subsequent review.
4. The Contractor shall modify the design of product(s) as required, in accordance with the specifications for modification provided by the Department of Education. If required by the Department, the Contractor shall again submit the design of products and procedures for review and approval. Any subsequent design review shall be completed by the Department within seven working days of receipt of the design.
5. Upon approval of product design(s), the Contractor shall develop products and/or execute procedures in accordance with approved designs and/or specifications.
6. The Contractor shall submit developed product(s) and/or detailed records of executed procedures to the Department of Education for review and approval.
7. Within seven working days* of receipt of products and/or procedural records, the Department of Education shall complete its review and shall either (a) approve the product(s) and/or procedural records as submitted, or (b) provide specifications for the modification of product(s) and/or the remediation of faultily executed procedures. The Department shall also notify the Contractor of the need for submission of any modified products or records of remediated procedures for subsequent review.
8. The Contractor shall modify products as necessary, and/or remediate procedures as necessary, in accordance with specifications provided by the Department of Education, and shall submit evidence of product modification and/or remediation of procedures, as required by the Department. Five copies of all final products shall be delivered to the Department prior to their implementation.
9. Upon completion of products in accordance with approved designs and specifications, and/or upon successful execution of procedures in accordance with approved plans and specifications, the Contractor shall submit final products or records of executed procedures to the Department of Education in accordance with an approved plan of work and time schedule.
10. Within seven working days* of receipt of final products and/or records of finalized procedures, the Department of Education shall notify the Contractor of acceptance of said products and procedures, or of unresolvable deficiencies in products and/or procedures, detailing deviations from approved plans, designs and specifications, and specifying modifications of payment schedule and/or payment amount.

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* 10 days for first review of formatted test and administration manuals; 15 days for review of response tapes

2.5 Notification of Communication

The Contractor will notify the Department in writing and supply a sample of all material sent to any district, including letters, memorandums, significant phone conversations, test materials, etc. Except in unusual circumstances, the Contractor will be in direct contact with the District Coordinator rather than the School Coordinator or test administrator.

2.6 Meetings Between the Contractor and the Department

The successful operation of the assessment program will require a number of meetings between staff members from the Contractor and the Department. Meetings may be necessary in conjunction with the following activities:

1. Introduction to Contractor's facilities and staff, about May 15
2. Preparation of Basic Procedural Design and administration manuals
3. Preparation of coordinators' manuals and training materials
4. Florida training sessions
5. Semi-annual meeting of district coordinators of accountability (2)
6. Review of proofs
7. Monitoring of receipt and scoring
8. Final wrap-up

The funds allocated to travel should cover the above meetings and be available for reimbursement to Department personnel for travel related to the contract, subject to agreement by the Department and the Contractor.

3.0 SCOPE OF WORK

An overview of the tasks to be performed under contract is provided in the section headed "Statement of the Problem," 2.2. Details of tasks to be performed under contract are contained in this section.

3.1 Assembly of Test Forms

The Contractor shall design and assemble the tests in accordance with the Basic Developmental Sequence described herein consistent with constraints and specifications provided by the Department of Education. Multiple sessions will be required with the maximum time per session and per test shown below:

	PER SESSION	MAXIMUM TESTING TIME
Grade 3	60 minutes (with break)	180 minutes
Grade 6	90 minutes (with break)	240 minutes

If sittings are of different lengths, the longest sitting must be first. The tests will be designed to measure student knowledge of each objective rather than test-taking speed.

The exact number of items to be included on the test is not known, but will approximate the data shown below:

	OBJECTIVES	ITEMS	PAGES IN BOOKLET
Grade 3	75	200	40
Grade 6	90	240	36

In preparing the tests, the Contractor first shall submit for approval the printing specifications, including printed examples from each subject area showing the type size, ink color, paper, and general layout to be used. The items provided by the Department shall be typeset, one exercise per page (an exercise includes all items measuring a single objective), according to the agreed-upon specifications; proofed and corrected by the Contractor; and then submitted to the Department for review. The Contractor shall make any indicated changes in items; format the items into pages (the Department will indicate the general sequence in which the items are to be used); and field-test the items and administration manuals as described in 3.2. After making any modifications indicated by the field test, the Contractor shall submit the final page proofs for Department approval.

Within each subject area and grade level, every item contained in item-pools provided by the Department of Education shall be used unless, because of the amount of testing time available or item weakness, the Contractor recommends and the Department agrees to the omission of certain items.

The Contractor shall in no way modify the arrangement or format of individual test items; e.g., an arithmetic exercise in columnar form: $\begin{array}{r} 2 \\ +\ 4 \end{array}$, shall not be changed to linear form: 2+4=___.

Work space shall be provided in the test booklet beside the appropriate items. The Contractor may utilize scoring aids such as keypunch cues, consistent with an approved plan for scoring of answer sheets or test booklets. However, keypunch or scoring cues shall in no way interfere with the layout or readability of test items or instructions. If answer sheets are employed, they must be designed for convenient use by both left- and right-handed students.

Within the constraints and specifications provided by the Department of Education in Appendix A, the Contractor shall design, develop, and submit to the Department eight copies of the tests required for each subject area and grade level and their corresponding administration manuals. The manuals should be clearly and efficiently organized to facilitate use by test administrators; should be formatted (type style and spacing) to differentiate clearly between directions to the administrator and to the student; and should provide the administrator with an overview of the entire assessment program as well as a description of all test administration duties.

For each test designed and assembled, the Contractor shall prepare a detailed blueprint indicating by number which items measure each objective. In each test booklet, items shall be numbered sequentially from one throughout the entire test, not from one for each subject. Eight copies of the blueprints will be submitted to the Department at the same time as the proofs of the test booklets. Eight copies of the machine-scoreable answer sheets for grade six should be submitted with proofs of the test booklets; the answer sheets will not be approved until the Department has verified the accuracy of the answer sheets against final test copy. The Contractor shall design, develop and execute a procedure for assessing the quality of results of test form assembly, in accordance with the Basic Developmental Sequence described above, including plans for proofing the test as soon as it has been printed and contingency plans for error correction should they occur in the printed tests. The Contractor's procedure shall be 99% accurate.

3.2 Field Test of Test Forms and Administration Manuals

The 1975-76 field testing shall include at least three administrators per grade with a minimum of five students each, using photocopies of the final test layout and answer sheet. The purposes of the field test are (1) to identify any printing errors, inconsistencies in instructions, or unanswerable items; (2) to evaluate the adequacy of the test administration manuals; and (3) to verify the amount of time required per sitting to allow all students to finish. The Contractor will

collect feedback from administrators and students; recommend any indicated modifications in items, directions, manuals, or formatting of tests; and, upon Department approval, make such modifications. Statistical item analyses are not required.

3.3 Printing of Test Materials

In accordance with approved designs and modifications, the Contractor shall print all test booklets, administration manuals, distribution manuals, forms, and postcards. The Contractor shall design printing specifications, develop plates and proofs, and execute printing of materials in accordance with the Basic Developmental Sequence described herein. Quantities of materials printed shall be sufficient to meet the requirements of the population and testing design described below, plus allowance for (1) copies for district coordinators, school coordinators, and test administrators; (2) replacement of lost shipments; and (3) an overage allowance of eight (8) percent.

Following is a tentative list of materials which require printing. The Contractor shall verify the completeness of this list and modify it as necessary to achieve the successful execution of the Florida Assessment Program in accordance with his design for distribution and receipt of materials.

1. Test booklets for grades three and six, with the grade three booklet to be machine-scoreable.
2. Answer sheets for grade six.
3. Test administration manuals for each grade. One manual shall be provided for every 30 students in a school.
4. Manuals which specify procedures for conducting testing and for distribution of testing materials by district coordinators and school assessment coordinators. Separate manuals will be required for district coordinators and for school coordinators.
5. Postcard forms to be used by district coordinators and school coordinators to notify the Contractor of (a) receipt of testing materials and (b) distribution of testing materials.
6. Test packaging materials, including labels for transmission of test booklets, forms, and containers for transmission of materials.
7. District exception forms for indication of deviations from specified testing procedures (2-copy forms).
8. School exception forms for indication of deviations from specified testing procedures (3-copy forms, one for every administrator).
9. School data sheets for recording the number of pupils in the grade, the number officially exempt from testing, and the number who missed all testing (2-copy forms).

There are 67 county school districts in Florida. Assessment instruments will be administered to students in all schools which contain students in grades three and/or six. The number of schools will be approximately 1,355. Approximately 630 schools have only grade three, 200 have only grade six, and 525 have both three and six. The exact number of tests needed will be determined by the final assessment plan which will be developed by the Department.

Cost estimates will be required based on test administration to approximately 110,000 students in grade three and 130,000 students in grade six. Cost estimates for increasing or decreasing the number of tests for each grade in increments of 1,000 tests must be provided.

3.4 Distribution Procedures and Receipt Control

The Contractor shall complete the following items in connection with distribution procedures:

1. Obtain list of district coordinators from Department of Education.
2. Obtain list of schools within districts from Department of Education, including the number of students per school per grade.
3. Obtain assessment plan from Department of Education, indicating which districts will require direct shipment to individual schools. The proposal should cover costs of distribution to district offices; districts desiring shipment to schools will enter into separate agreements with the Contractor.
4. Design and develop mailout procedures for school districts and schools.
5. Design and develop field handling procedures for school districts and schools.
6. Provide return notices from both districts and schools following the receipt of materials from the Contractor or district office and the return of materials to the district office or Contractor.
7. Design packages of tests and ancillary materials for mailout. Materials should be packaged and labeled by school. The Contractor shall ship materials to one or more centrally located distribution centers located in Florida. From this distribution center the Contractor then will ship materials to the district coordinators or to schools if districts pay the extra costs of such shipment. Because some carriers visit certain parts of Florida only on a weekly basis, the Contractor must select carriers carefully in order to deliver materials on schedule. District coordinators will have the responsibility of distributing prepackaged materials to individual schools and notifying the Contractor of receipt and transmission of materials.
8. Design return procedures. Schools will return materials to the district office in returnable boxes supplied by the Contractor, notifying the Contractor of such action, and the district will return materials to the Contractor. A receiving center in Florida should not be proposed, as it would delay the processing of student reports. The Contractor shall acknowledge receipt of materials to each district or school. The Contractor shall pay shipping charges on shipments to the districts; districts will pay return charges. Return labels shall be provided, affixed to the returnable boxes. All materials must be accounted for prior to, during, and after the assessment.
9. The Contractor shall establish in Florida a center for supplying extra materials. District coordinators also shall have a portion of extra materials to cover initial school shortages. Said center shall be maintained from the time materials arrive in Florida until the testing period has ended (approximately October 24).
10. The Contractor shall design and develop materials which can be used to train district and school-level personnel in the handling of materials and administration of the assessment instruments (see 3.6).
11. The Contractor shall develop receipt-control and follow-up procedures with the cooperation of Department of Education staff. Receipt-control and receipt validation procedures shall be designed so as to insure a 100 percent accounting for all test booklets and answer sheets mailed to school districts. At the time the response tapes are delivered, the Contractor shall supply to the Department a tape indicating by grade, district, and school (1) the total number of pupils in the school; (2) the number of students officially exempt from assessment (e.g., blind, educable mentally retarded, etc.); (3) the number of students who should have been tested but were not (e.g., because of absence throughout the entire testing period); (4) the number of students theoretically tested, above items (1) — (2) + (3); and (5) the number of student records for that school on the response tape. The Con-

tractor is expected to account for any differences between 4 and 5 and to remedy such differences as requested by the Department. It is assumed that follow-up responsibilities will be shared by the Contractor and Department of Education. The Offerer shall specify a desired sharing of responsibilities for these activities, including a specific listing of tasks to be accomplished and responsible agencies for each task.

3.5 Editing, Scoring and Tape Preparation

The Contractor shall design and develop procedures for editing and scoring response documents and for data tape preparation. The following tasks shall be accomplished by the Contractor:

1. **Response Document Edit Procedures.** These procedures shall specify in detail the quality controls which will be exercised during the scoring of student response documents. Every student record must be identified by the correct district and school number and by a unique (to that school and district) student number. Provisions shall be made for handling documents which contain multiple marks; are coded incorrectly with respect to student, school, or district identification; or which are deemed partially or wholly unscoreable for some reason. These procedures also shall provide specifications for resolution of the detected errors. Procedures also shall be developed for handling school and district exception forms and for providing feedback to districts and to the Department as to the actions taken on both specific cases and general types of problems.

2. **Use of District Data Tapes for Student Demographic Information.** In order to reduce the amount of student and teacher time spent in coding student information which is already available in district data files, the Contractor shall develop procedures whereby districts may, at their option, submit any or all of the demographic information (described under 3.5.4) on computer data tapes built according to tape formats agreed upon by the Contractor and the Department. After testing, the Contractor shall match the district-supplied data files to the students' response records, using student numbers, student names, or some other mutually agreeable data.

   The number of districts interested in this option is not presently known, but in 1974-75, when districts had to pay for a similar service, three districts with 22% of the student population participated. It is anticipated that the number will be greater this year, since all costs will be covered in the contract between the Department and the Contractor. All districts interested in this option will make a commitment to that effect no later than August 1, 1975.

3. **Scoring.** The Department will verify all machine-scoring keys. The Contractor shall demonstrate 99% accuracy per item and 99.99% accuracy overall in scoring. In preparing the Student Response File (see 3.5.4), all items will be scored on a pass (1), fail (2), omit (3), omission of a sitting (4), or invalid item (5) basis. Some items, no more than 15% per grade, will require the selection of two or more responses in order to be scored as a pass.

4. **Tape Preparation.** As a result of scoring, the Contractor shall produce two separate data files for use by the Department in subsequent analyses. The Department will specify the tape format for each file; these formats will be similar to, although not necessarily identical with, the 1974-75 formats shown in Appendix B. Both files will contain one record per student and require inclusion of the student information listed below:

   (a) County (district) number and school number. The Department of Education will provide the Contractor with a list of school names and corresponding county-school numbers. Response documents will be returned to the Contractor with an identification of the school from which they came. The Contractor shall verify that the county-school number is coded correctly; 100% accuracy must be achieved.

(b) Student name (18 characters).

(c) Four-digit student identification number unique to that school and district (Contractor-generated).

(d) Ten-digit numeric field for optional district use.

(e) Attendance record per sitting, including notation of make-up.

(f) Demographic data, in coded form, to indicate grade, age, sex, race, native language, and such other characteristics as may appear on the response document. These data will be determined in consultation with the Department and will be known prior to printing of assessment instruments.

The first file, the Student Response File, will contain information on student performance on each item. In addition to the final Student Response File, the Contractor shall provide a preliminary data tape containing the records of at least two districts with two to three schools each by November 15, for use by the Department in testing its analysis and reporting system.

The second file, the Student Objective Data File, to be organized by subject and objective, will contain at least the number of items answered correctly for each objective and the number of items measuring the objective.

Any deviation from this procedure must be approved by the Department of Education. The Contractor shall provide appropriate documentation of tape content and layout in accordance with documentation standards supplied by the Department of Education. The actual data reduction procedures used by the Contractor to move from scoring to a clean tape are at the discretion of the Contractor, with the approval of plans by the Department of Education. However, no allowance will be made in the award of the contract for the development of computer programs, the purchase of EDP consulting services, or the acquisition of EDP hardware.

5. **Printing Individual Student Reports.** The Department will deliver to the Contractor two-ply preprinted forms on which the Contractor is to computer-print individual reports for each student assessed. Each student's report will be one 11 x 14 page, with approximately 50 lines of printing. The reports are to be burst (separated) by student, packaged by school, and shipped to the district, unless the district pays the extra costs for direct shipment to schools.

Information to be printed on the student report includes the county-school code; district, school, and student name; and all demographic information, using words rather than codes (e.g., white or black for race, instead of 1 or 2). A separate line will be printed for each objective, showing the number of items measuring that objective, the number of items the student answered correctly, and the pattern of item achievement (see Appendix C for an example of the 1974-75 student report). At the bottom of the report, totals will be printed. Note that if the student omitted some items (coded "4"), no totals will be printed.

Before the Contractor begins production of the student reports, he must provide the Department with the following materials necessary for the Department to assure itself of the accuracy of the programming for scoring and indicating objective achievement:

(a) For the first batch of actual 1975-76 response documents which pass through the established scoring routine, a student response file in the format required by the Department

(b) A copy of the Student Objective Data File for the same batch of students

(c) A copy of the student report for these students

As soon as the Department has received and approved these documents, the Contractor can proceed to print and distribute all student reports.

The Contractor shall ship all student reports no later than November 28, with the exception that reports for schools whose material was not received by the Contractor by November 7 may be delayed up to the number of days by which the school was late in returning materials. The Contractor is not responsible for scoring materials received after November 24.

6. **Item Analyses.** The Contractor shall perform a standard item analysis using at least a 5% random sample of all students tested; identify any items which appear to need revision and suggest the type of revision; and provide the Department with at least eight copies of the analyses and reports. The item analyses shall provide at least the following information: the percent choosing each foil and omitting the item; difficulty and discrimination indexes (within domain) for each time; biserial and point biserial correlations between each item and the domain score (the domain score is the number of correct items per subject); the split-half reliability for each domain; and the inter-domain correlation coefficient.

   In addition, as a separate cost option (see section 7.4.4), the Contractor shall develop procedures for printing item analyses upon request on a district or school breakdown, with the cost of said analyses to be borne by the district. Any requests for such analyses shall be known prior to the time scoring is completed; the Contractor will not be expected to respond to late requests.

3.6 Training Materials

Assessment training is a multi-step operation, since district coordinators, school coordinators, and test administrators all need information related to their particular assessment responsibilities. The Department of Education will provide training sessions to the district coordinators of accountability; the district coordinators will train the school coordinators; and training of test administrators will be conducted either by the district or the school coordinator. Because of the multi-step nature of training, materials must be prepared by the Contractor both (1) to address the tasks to be performed by each member of the assessment operation, and (2) to provide those responsible for training with the information and materials necessary to conduct training sessions.

The following specific, separate materials are to be prepared:

1. Separate manuals explaining the responsibilities of the district coordinator, the school coordinator, and the test administrator. The manuals should cover the overall processing and administration of test materials from their initial entry into the school district office, through their transmission to individual schools, their administration to students, their return to district offices, and their final dispatch back to the Contractor. Each manual should contain all information related to successful completion of their respective assessment duties, including—but not limited to—an overview of all activities, both verbally and in flow chart format; a calendar of activities; descriptions of all materials that will be received, and when; and copies of all forms to be completed by the individual. The manuals should be clearly and efficiently organized to facilitate use by school and district personnel, including a table of contents. Test administration manuals should contain complete information on coding demographic data, and each administrator must have a copy of the correct district and school codes furnished by the Contractor (e.g., a label to attach to the manual).
2. Training materials to be used by Department of Education staff in training district personnel. Training materials include transparencies and other audio-visual aids, handouts, and a script for use by the person conducting the training session. This set of training materials should (1) provide a dry-run of the activities expected of the district coordinator; (2) review

the activities of the school coordinator and test administrator to prepare the district coordinator to conduct training sessions for these individuals.

3. Training materials to be used by the district coordinators in training school coordinators and test administrators. Training materials should include masters of transparencies and handouts and a script which coordinates use of the transparencies and handouts.

One final copy of the materials identified in #1 and #3, plus the handouts from #2, are to be received by the district coordinators no later than one week prior to the first training session. The additional copies of the school coordinator's and test administrator's manuals are to be delivered to the district coordinator by the first day of the training sessions.

While the Contractor will produce the training materials to be used by the Department of Education, planning of the training materials and sessions will be performed jointly by the Department of Education and the Contractor at a meeting between the respective staff members responsible for this area. The development of forms, manuals, and training materials must be done by someone with prior expertise in this area; the proposal shall indicate who would be assigned these responsibilities and document their expertise. In addition, the Contractor will provide at least one person who is thoroughly familiar with all aspects of the Contractor's operation for technical consultation at each training session. There will be at least one and no more than three training sessions held throughout Florida between August 11-14. The exact schedule and location of the sessions will be determined by the Department.

The Contractor shall determine the effectiveness of the training sessions and materials in at least two ways: (1) directly, by obtaining feedback from participants at training sessions and from those who use the materials to conduct training sessions (feedback may be obtained by questionnaire, interview, etc.); and (2) indirectly, by recording and analyzing instances and types of inadequate discharge of procedures (e.g., failure to code demographic information correctly, failure to package materials according to directions). A summary of the information obtained in #1 and #2, plus recommended changes in training procedures and materials, shall be supplied to the Department as part of the final report, in such form as to be usable in procedural design for the following year.

3.7 Report Preparation

Three written reports are to be prepared by the Contractor:

1. The Basic Procedural Design, which describes the specifics of all proposed procedures and includes drafts of all proposed forms, letters, manuals, etc. This report will be delivered no later than June 16, 1975.
2. A report on the adequacy of assessment procedures, including:
   (a) A detailed review of the actual procedures employed, including records of cost, time, and manpower expenditures; a comparison against planned procedures in the proposal and the Basic Procedural Design; notation of discrepancies; and an explanation of the causes of the discrepancies.
   (b) Tallies and written summaries of information collected on forms, e.g., test administrator comments, invalidation forms, etc.
   (c) A detailed review of the problems encountered in the execution of the Assessment Program and suggestions for elimination of problems in subsequent years.
   (d) Other suggestions for the improvement of procedures, plans, and activities of future Statewide Assessments.

   This report will be delivered no later than January 5, 1976.
3. A final report which includes an overall evaluation of the project, item analyses, and related reports. This report is due no later than February 27, 1976.

4.0 PRODUCTS TO BE DELIVERED BY THE CONTRACTOR

The following products shall be delivered by the Contractor to the Department of Education in accordance with an approved schedule and in quantities specified in the section headed "Scope of Work," above. Unless otherwise specified, five copies of all reports shall be provided by the Contractor.

1. The Basic Procedural Design Manual, delivered no later than June 16, 1975.
2. Training manuals and materials for conducting training sessions, delivered to the Department and to district coordinators by August 4, 1975.
3. Correct quantities of test booklets and answer sheets, appropriately packaged by district and school, and delivered to district coordinators not before September 8 or after September 15, 1975.
4. Test response files (one per grade), delivered by November 15, 1975.
5. Printed student reports, delivered to districts no later than November 28, 1975.
6. Two verified, clean computer tapes containing scores of all examinees on all test items, delivered no later than December 15, 1975.
7. Complete documentation of the format and content of the computer tapes, delivered no later than December 15, 1975.
8. A computer print-out, by district and school, of the number and percentage of enrollment tested by grade, delivered no later than December 15, 1975.
9. Analysis of the information contained on the returned school district exception forms and school exception forms, delivered no later than January 5, 1976.
10. Standard item analysis of all items used accompanied by a list of identified weak items and suggested modifications, delivered within two weeks of acceptance of the final response tapes.
11. The report on adequacy of assessment procedures, delivered no later than January 5, 1976.
12. The final report, delivered no later than February 27, 1976.

4.1 Disposition of Materials

The Contractor agrees to hold and dispose of materials according to the stipulations listed below:

1. After testing, the Contractor will count the number of unused booklets and manuals and ship to the Department the quantity specified by the Department, disposing of the other materials.
2. After acceptance by the Department of the clean computer tapes, test booklets and answer sheets will be held for a period of 120 days. At the end of 120 days, the Contractor will ship or destroy the test booklets according to instructions from the Department.
3. All manuals for administration of tests and field handling of materials shall be shipped or destroyed, according to the Department's instructions, by February 16, 1976.
4. All forms and other materials returned by the districts shall be shipped or destroyed, according to the Department's instructions, by February 16, 1976.
5. The Contractor agrees to deliver to the Department, upon request, all source materials not mentioned above that are used in conjunction with this project, including test booklets, answer sheets, card decks, computer tapes, computer listings and computer files within 30 days following acceptance by the Department of the Final Report of Activities.

PART II—MANDATORY AND CONTRACTUAL INFORMATION

5.0 MANDATORY REQUIREMENTS

5.1 Introduction

The following subparagraphs prescribe the mandatory requirements which shall be complied with in response to this RFP. A statement demonstrating compliance with all of these mandatory requirements shall be supplied by the Offerer in his proposal. *Failure to comply with any of these mandatory requirements will subject the Offerer's proposal to immediate rejection.*

The mandatory requirements prescribed in these paragraphs are intended to clarify the intent of the RFP and the critical requirements of the State.

These mandatory requirements are not the sole requirements of this RFP and Offerers allowed to participate in the evaluation may be rejected for not substantially adhering to the detailed technical requirements set forth throughout this RFP.

5.2 Proposal Mandatory Procedures

The following subparagraphs summarize the mandatory procedures of this RFP process:

5.2.1 Submission of Mandatory Forms

1. Offerers are required to return by certified mail or hand carry the "Specification Acknowledgement Form" by the date indicated thereon. The form shall be signed and dated by a representative of the Offerer's company.
2. Offerers shall submit their proposals by the time indicated in the Calendar of Events in the RFP, with all cost data, to Crane Walker, Student Assessment Section, Department of Education, Tallahassee, Florida 32304.
3. Offerers shall submit all costs in the exact formats specified in "Cost Proposal."

5.2.2 Cost Discussions

Prior to evaluation of an Offerer's proposal, the Offerer's cost data will remain confidential. During this period, any discussion by the Offerer involving cost information will be considered grounds for rejection.

5.2.3 Verbal Instructions Procedure

No negotiations, decisions, or actions shall be executed by the Offerer as a result of any discussions with any State employee. Only those transactions which are in writing from the State may be considered as binding. Also, the State will honor only transactions from Offerers which are signed and in writing.

5.3 Liquidated Damages

The Offerer shall agree to provide for liquidated damages as specified in paragraph 8.3 of this RFP in order to be considered for selection. This agreement must be submitted with the proposal.

5.4 Bid Bond

The Offerer must submit a bid bond as specified in paragraph 8.4 of this RFP in order to be considered for selection. Failure to do so will subject the Offerer's proposal to rejection.

5.5 Disclosure Affadavit

If selected as the successful Offerer, the Offerer agrees to sign a disclosure affadavit (see Appendix D), and such agreement shall be included in the Offerer's proposal. Failure to do so will subject the Offerer's proposal to rejection.

5.6 Delivery Dates

In order to be considered for selection, the Offerer shall agree to deliver all required items of this RFP in accordance with the dates indicated in the Calendar of Events, paragraph 6.1 of this RFP.

6.0 BIDDING PROCESS

The purpose of this Request for Proposals and the bidding process is to secure for the Department the Contractor most capable of providing the services enumerated in this document at the lowest cost. In order to provide all Offerers with equal information, questions about this Request for Proposals should be addressed in writing to Dr. Crane Walker and received by the Department no later than March 25, 1975. The questions received from all potential Offerers will be answered in writing by the Department by March 28, and all Offerers will receive copies of all questions and answers.

There will be no bidders' conference for this Contract. However, the Department is holding one of its semi-annual meetings with district coordinators in Orlando on April 14-15, with a primary function of the meeting being a critical review of 1974-75 assessment procedures and discussion of procedures planned for 1975-76. All Offerers are invited to attend the meeting, as the information obtained will be of great value to the successful Offerer. The meeting will be held at the Howard Johnson's, I-4 and Lee Road, from 1:00-4:30 p.m., April 14, and 9:00-4:00, April 15.

6.1 Calendar of Events

Release Request for Proposals (RFP)	March 14, 1975
Written Questions Due	March 25, 1975
Written Answers Sent	March 28, 1975
Receive Proposal by close of business (COB)	April 16, 1975
Evaluation Completed	May 1, 1975
Project Begins	Upon signing by both parties

6.2 Proposal Closing Date

Ten (10) copies of each proposal must be received by the Student Assessment Section, Department of Education, Tallahassee, Florida 32304, not later than COB, April 16, 1975, date certain.

The Offerer shall label the proposal and submit it, together with his bid bond. *Requests for extension of this date will not be granted.* Offerers are responsible for the timely receipt of their proposals. Proposals submitted will become public information at such time as the State has evaluated the proposals.

6.3 Addenda to the RFP

All addenda to this RFP will be mailed by certified mail with the content and number of pages described. The Offerer must acknowledge receipt of all addenda content and number of pages contained by the date indicated on the "Addenda Acknowledgment Form" which will be mailed with all addenda.

6.4 Alternate Proposals

Selection of the lowest qualified bidder will be based on response to the requirements set forth in this RFP, and no alternate proposals or separate cost options will be considered in the selection. However, the Offerer may include alternate proposals as separate cost options which will be negotiated between the Department and the successful bidder.

6.5 Contractor's Oral Presentation

Oral presentations to supplement the Offerer's proposal may be required. This presentation may include a discussion of:

(a) Job understanding

(b) Staff assignments

(c) Procedures for field testing and printing

(d) Procedures for distribution, receipt, quality control, and scoring

(e) Payment procedures

6.6 Economy of Preparation

Proposals should be prepared simply and economically, providing a straightforward, concise description of the Offerer's plans and ability to meet the requirements of the RFP. Fancy bindings and/or colored displays are not desired; however, technical literature relating to proposed services may be included. Emphasis should be on completeness and clarity of content.

6.7 Proposal Evaluation

The Offerer shall allow not less than fifteen (15) days from the deadline for submission date for evaluation purposes. The content of the proposal submitted by the successful bidder will be considered a contractual obligation. Failure to meet these obligations and contractual requirements will result in cancellation of the award and forfeiture of the Bid Bond.

6.7.1 Criteria for Selection

All proposals received shall be subject to an evaluation by a committee of qualified professionals selected from within the Department of Education. Selection of the successful bidder will be made solely on the basis of who is the lowest qualified bidder. The following areas of consideration will be used in determining whether or not a bidder is qualified.

(a) **Corporate Qualifications.** This refers to the capability of the organization to meet the terms of the RFP. Consideration will be given to whether the organization has sufficient resources to work within the time constraints while maintaining desired performance levels. Prior experience in large-scale testing programs is required. As a minimum, the organization must have been the Contractor for at least three large-scale testing programs involving at least 50,000 students per program and responsibility for printing, distribution, receipt, and scoring.

In addition, consideration will be given to the competence of professional personnel who will be assigned to the job by the Offerer. Qualifications of professional personnel will be judged on the basis of education and experience, with particular reference to experience on projects of a similar nature.

(b) **Compliance with the Technical Requirements of the RFP.** The Department expects the Offerer to develop a plan for providing all of the services requested. Each proposal also will be evaluated on (1) the Offerer's understanding of the needs of the Florida Statewide Assessment Program as outlined in the RFP, of the objectives in asking for the services and undertaking, and of the nature and scope of the work involved; (2) technical quality and procedures, with an emphasis on the techniques proposed for executing the proposed task, the sequencing of tasks, and the methods used for quality control.

(c) **Compliance with the Mandatory Requirements of the RFP.** The Offerer is expected to comply with all mandatory requirements of the RFP.

6.8 Rejection of Proposals

The State reserves the right to reject any and all proposals. The State intends to award a contract on a technical and basic cost basis and does not intend to pay for information solicited prior to entering into a contract with the successful Offerer. Separate cost options will be considered independently and will not influence the selection of the successful bidder. All proposals become the property of the Department of Education.

7.0 PRODUCTS REQUIRED OF THE OFFERER

7.1 General

To be considered, submitters must provide a complete response to the RFP. Each proposal must be submitted in ten copies to the Student Evaluation Section. No other distribution of proposals shall be made by the Offerer. Proposals must be signed by a company official with authorization to bind the Offerer to its provisions. Proposals must include a statement as to the period during which the proposal remains valid.

The Offerer shall submit a three-part Proposal. Part I shall consist of a Technical Proposal which presents a plan for performing the work to be performed under contract; Part II shall consist of a Management Proposal which identifies schedules, personnel, and quality control procedures; and Part III shall consist of a Cost Proposal in the *exact* format described in 7.4 of this RFP.

7.2 Technical Proposal

This section of the Offerer's Proposal will, if he is the successful bidder, become the Statement of Work for which he will be contractually responsible. The Offerer's Technical Proposal shall describe, in narrative form, his technical plan for accomplishing the work. The Technical Proposal shall relate the Work Breakdown Structure and the Cost Breakdown Structure as specified herein. Modifications of the task descriptions are permitted upon approval of the Project Coordinator. The Offerer's Technical Proposal shall first indicate his understanding of the tasks to be performed, the overall scope of work, and the problems likely to be encountered in performing the work. Next, the Offerer shall indicate his intention to perform each of the tasks described in the section of the Request for Proposals headed "Scope of Work." To the extent possible, the Offerer shall indicate the methods and procedures to be used in accomplishing each task. Sound plans for execution of the work required will be weighed heavily in evaluating proposals. In particular, the Offerer shall submit draft procedures for accomplishing the following:

1. Developing usable test administration and school and district coordinator manuals
2. Printing error-free test booklets which conform with the Department's printing specifications

3. Mailout and distribution of testing materials to school districts and schools, and accounting and control procedures to be used while materials are not in the Contractor's possession
4. Procedures to be used in receiving materials to insure adequate accounting and control of materials received
5. Preparation of instructional materials with which the training of school district personnel is to be accomplished

7.3 **Management Proposal**

The Offerer's Management Proposal shall indicate procedures through which timely delivery of high quality products will be insured and methods by which deviations from schedules and specifications will be detected and corrected. In addition, the Management Proposal shall include the schedule for completion of work, the personnel to be responsible for completion of each task, specific estimates of total man-days involved for each task, the qualifications of professional staff, and indication of corporate experience in completing tasks similar to those required by this Request for Proposals.

Schedule. The Offerer's Management Proposal shall include a detailed schedule for the completion of each task specified in the section headed "Scope of Work," above. In addition, a GANT chart and/or PERT chart shall be included in the Proposal to illustrate the interrelationship between tasks and the proposed calendar periods during which tasks will be accomplished.

Control Procedures. The Offerer's Management Proposal shall indicate the procedures through which (1) progress in the execution of the program of work will be monitored, (2) deviations from planned milestone schedules or prescribed levels of quality will be detected, (3) the Department of Education will be notified of deviations from planned milestone schedules or prescribed levels of quality, and (4) corrections will be achieved on a timely basis.

Organization. The Offerer's Management Proposal shall contain a chart indicating the proposed organization of program staff and the position of program staff in relation to the regular corporate organization. All key role-positions shall be indicated, and occupants of managerial and professional role-positions shall be listed by name. This section should state the full name and address of the organization and, if applicable, the branch office or other subordinate element that will perform or assist in performing the work of the contract. It should indicate whether the Offerer operates as an individual, partnership, or corporation; if as a corporation, it must include the state in which the Offerer is incorporated. The Offerer should include a copy of his authorization to conduct business in the State of Florida or, in lieu thereof, a statement that, if successful, he will become authorized to do business in Florida within 120 calendar days of the award of the contract.

Personnel. The Offerer's Management Proposal shall indicate by name the management personnel and professional personnel to be responsible for the completion of each task described in the section headed "Scope of Work," above. The Contractor must name an acting project director who is a member of the regular organizational staff and will be committed to the Florida Statewide Assessment Program at least half-time from May 15, 1975, to January 5, 1976. In addition, the Contractor must name an assistant director who can be contacted by the Department about all aspects of the project. The Offerer must indicate the amount of time (in full-time-equivalent man-days) each professional and managerial employee will devote to the completion of each task.

Staff Qualifications. The Offerer's Management Proposal shall contain a resumé for each professional and managerial employee who will assist in completing the tasks specified herein. Resumés shall indicate relevant educational background and professional or managerial experience, as well as permanent position in the Offerer's corporate structure.

Corporate Experience. The Offerer's Management Proposal shall indicate the experience of the corporation in completing programs of work and specific tasks similar to those required by this Request for Proposals. In addition, the Offerer shall list at least two companies and/or agencies for which work similar to that required herein has been completed. Former clients may be contacted to ascertain the quality and integrity of the Offerer's prior performance, so references should be as complete as possible, including listing of responsible individuals, clients, addresses and telephone numbers.

Subcontractors. At the mutual option of the Contractor and the Department of Education, the Contractor may choose to employ a subcontractor for the completion of one or more tasks. If the Contractor proposes to employ a subcontractor(s), the qualifications of subcontractor(s)' staff and corporate qualifications shall be documented at the same level of detail as those of the Contractor. *All subcontractors shall be mutually agreeable to the Contractor and the Department of Education.*

7.4 Cost Proposal

7.4.1 Cost and Price Analysis

This information is required to support the reasonableness of the Offerer's quotation and is for internal state use only. The data will be held in confidence and will not be revealed or discussed with competitors. The cost format described in 7.4.2 must be used and must be followed exactly, but additional information, explanation, or clarification may be provided. Selection of the successful bidder will be made solely on the basis of who is the lowest qualified bidder as defined in Section 6.7.1

7.4.2 Cost Format

The Offerer shall submit a detailed justification of the funds required to complete the work described in this Request for Proposals, including a listing of costs by tasks, as shown on the table on page 49.

7.4.3 Certification of Costs

The Offerer shall complete the Certification of Costs statement (provided in Appendix E) and include it in the cost proposal as Exhibit A.

7.4.4 Separate Cost Items

Costs shall be supplied for the following items. These items will be considered separately and will not have an influence upon the selection of the successful bidder. The decision to exercise the options described in this section will be made after the successful bidder is chosen and the cost or costs of the selected options will be added to the base price as described in Section 7.4.2 of this RFP.

1. **Cost of Population Expansion/Reduction**

   A cost figure will be included which will cover all costs involved in expanding or reducing the size of the Department's proposed population size as presented in Section 3.5 of this RFP. This cost figure will be presented in terms of expansions or reductions of 1,000 tests by grade and a last possible date for notification will be included, which must be after July 1, 1975.

2. **Cost of District and School Item Analyses**

   Cost figures and plans should be included to cover all costs of printing and shipping item analyses upon request of a district. Cost figures should be provided for both a district-level

BASE COST PROPOSAL

Scope of Work Task	Cost Categories							
	Manpower	Supplies and Services	Mailing	Printing	Computer Services	Travel	Other (Specify)	Total
Program Overview								
Test Form Design and Assembly								
Field Test								
Materials Development a. Test Administration Manuals b. Coordinators Manuals c. Training Materials d. Forms, etc.								
Distribution								
Receiving								
Scoring								
Printing Student Reports								
Tape Preparation								
Report Preparation								
Other (Specify)								
Grand Total Base Bid								$_____

Price per 1000 of Increasing/Reducing Sample

3rd Grade $_____

6th Grade $_____

analysis and for school-level analyses, expressed as a cost per school. Districts will contract separately with the Contractor for this service no later than October 15, 1975.

3. **Shipping Directly to Schools**

   The Proposal shall include the Contractor's plans and requirements for districts who wish to pay the additional costs of shipping test materials and/or student reports directly to individual schools. The costs of packaging materials by school and shipping to districts are included in the base bid, so the districts would pay only additional shipping costs. The Contractor must either include a uniform additional charge in his Proposal or be prepared to figure the additional charges on a district-by-district basis prior to June 13, so that districts may indicate their choice of this option by July 15, 1975.

4. **Interpretive Report**

   The proposal shall include, as a separate cost item, the Contractor's plans and costs for preparing an interpretive report of the state's achievement in reading, writing, and mathematics for each grade. This report shall discuss the performance on each objective, relating performance to and summarizing results by major skill groupings within each subject area. Included in the report shall be a summary of the strengths and weaknesses indicated by assessment, recommendations for improvement, and a comparison of performance at grades three and six. The report shall be written for an audience of teachers and curriculum specialists, similar to the Section 3 of the 1973-74 *Technical Report* (included among the enclosures sent with this RFP).

   In addition, the Contractor shall supply a summary of the findings and recommendations for each grade, written for a public audience (similar to the 1973-74 *Capsule Report*, also included among the enclosures).

   As a part of report preparation, but not part of the interpretive report, the consultants preparing the report shall identify in writing any items which need revision and any skills which should be tested in future years in order to provide a complete data base for interpretation of third and sixth grade achievement of basic skills in these subject areas.

   The consultants selected to prepare the report must be mutually acceptable to the Department and the Contractor. The interpretive reports must be submitted in draft form for review by the Student Assessment Section and the Department of Education subject-area consultants no later than January 30, 1976. The documents will be reviewed by the Department and any modifications needed indicated in writing by February 20, 1976. The modifications shall be made by the consultants and/or Contractor and the final report submitted no later than March 17, 1976.

   The Proposal shall include the names of the proposed consultants and a summary of their backgrounds.

7.5 Additional Information and Comments

The Offerer should include any other information that is believed to be pertinent but not specifically asked for elsewhere.

8.0 CONTRACTUAL INFORMATION

8.1 Type of Contract

It is proposed that, if a contract is entered into as a result of this RFP, it will be a "total fixed cost" contract. The contract that will be entered into will be the most advantageous to the State, price and other factors considered. The contract will include all clauses necessary for concurrence with all laws, policies, and regulations of the State of Florida.

8.2 Acceptance of Proposal Content

The contents of the proposal of the successful Contractor will become a contractual obligation, if a contract ensues. Failure of the successful Contractor to accept this obligation will result in cancellation of the award and may provide justification for removal of the submitter from the bid list of the Department of Education until such time as he may prove to the Department's satisfaction his ability to bid responsibly. Any damages accruing to the state as a result of failure to contract may be recovered from the submitter.

8.3 Liquidated Damages for Delay

Timely delivery is imperative and, as a result, the Contractor will be required to enter into an agreement similar to the following for the completion of key activities as specified in 2.3:

> *It is further agreed that for each and every day work contemplated in this contract remains uncompleted beyond the time set for its completion, the Contractor shall pay to the Department of Education the sum of two hundred ($200.00) Dollars, as liquidated damages and not as a penalty. The said sum of two hundred ($200.00) Dollars a day may be deducted from money due or to become due to the Contractor as compensation under this agreement. This shall be in addition to any other remedies the Department of Education has by law.*

Should the Contractor see that he will not be able to meet a delivery date, he may request an extension. This request may or may not be granted at the discretion of the Department. If approval is granted by the Department, liquidated damages will not be assessed.

8.4 Bid Bond

The Offerer shall submit a bid bond in the amount of 10% of his bid price. The bond shall be submitted with the proposal, payable to the State of Florida from an institution authorized to issue performance bonds in Florida.

8.5 Delivery Dates

The State reserves the right to delay scheduled due dates if the delay is to the advantage of the State and if the delay creates no extra cost to the proposal Offerer. If this option is exercised, liquidated damages would not be charged for that period.

8.6 Prime Contractor Responsibilities

The selected Contractor will be required to assume responsibility for all services offered in his proposal, whether or not he produces them. Further, the State will consider the selected Contractor to be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the contract.

8.7 Independent Price Determination

(a) By submission of a proposal, the Offerer certifies, and in the case of a joint proposal each party thereto certifies as to its own organization, that in connection with this proposal:

1. The prices in the proposal have been arrived at independently without consultation, communication or agreement for the purpose of restricting competition, as to any matter relating to such prices with any other Offerer or with any competitor; and
2. Unless otherwise required by law, the prices which have been quoted in the proposal have not been knowingly disclosed by the Offerer and will not be knowingly disclosed by

the Offerer prior to award directly or indirectly to any other Offerer or to any other competitor; and

3. No attempt has been made or will be made by the Offerer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

(b) Each person signing the proposal certificate certifies that:

1. He is the person in the Offerer's organization responsible within that organization for the decision as to the prices being offered in the bid and that he has not participated, and will not participate, in any action described in A(1), (2), (3) above; or

2. He is not the person in the Offerer's organization responsible within that organization for the decision as to the prices being offered in the proposal but that he has been authorized, in writing, to act as agent for the persons responsible for such decisions in certifying that such persons have not participated, and will not participate in any action contrary to A(1), (2), and (3 and, as their agent, does hereby so certify; and that he has not participated, and will not participate, in any action contrary to A(1), (2), and (3).

(c) A proposal will not be considered for award if the sense of the statement required in the Cost and Price Analysis portion of the proposal has been altered so as to delete or modify A(1), A(3), or B. If A(2) has been modified or deleted, the proposal will not be considered for award unless the Offerer furnishes, with the proposal, a signed statement which sets forth in detail the circumstances of the disclosure and substantiates the fact that the disclosure was not made for the purpose of restricting competition.

8.8 **Design Control**

The control of design remains the total responsibility of the State of Florida. Changes in the design made after the award of the contract will be at the discretion of the State. The State also reserves the right to substitute work tasks on a generally equal basis. Substitutions will be made only prior to the Offerer beginning significant effort in completing the task. All design changes or substitutions will be given to the Offerer in writing. The intent of this section is not to allow for increasing the scope of the proposal but to protect the State as design changes that would improve the products become known during the development schedule.

8.9 **Project Review and Approval**

The Contractor agrees to provide a Technical Proposal, a Management Proposal, and a Cost Breakdown Structure. The Contractor agrees to submit the required document or documents resulting from each task to the Department for review and approval prior to beginning work on the next task. This review will be conducted by the project coordinator, Dr. Crane Walker, Administrator, Educational Accountability, Department of Education, Tallahassee, Florida 32304. All payments will be dependent on the Technical and Management Proposals.

C A P PUBLICATIONS

Report Number

1 *Annotated Bibliography of the State Educational Accountability Repository.* Phyllis Hawthorne. Revised April 1974. Wisconsin.

2 *Legislation by the States: Accountability and Assessment in Education.* Phyllis Hawthorne. Revised August 1974. Wisconsin.

4 *State Goals for Elementary and Secondary Education.* Susan Ketchum Ribble. Revised September 1973. Wisconsin. ERIC ED 083747.

5 *Characteristics of and Proposed Models for State Accountability Legislation.* Phyllis Hawthorne and Archie A. Buchmiller. April 1973. Wisconsin. ERIC ED 078514

6 *Accountability: A Bibliography.* Gordon P. Hanson. July 1973. Wisconsin. ERIC ED 084630.

20 *Keeping the Public Informed: Accent on Accountability.* A digest of the Michigan dissemination model. Erwin P. Bettinghaus and Gerald R. Miller. 1973. Michigan.

21 *A Dissemination System for State Accountability Programs.* Erwin P. Bettinghaus and Gerald R. Miller. June 1973. Michigan.

22 *Developing a Large Scale Assessment Program.* Frank B. Womer. July 1973. Minnesota.

23 *Indicators and Statewide Assessment.* March 1974. Oregon.

24 *Roles of the Participants in Educational Accountability.* Carl E. Wilsey and Glenn B. Schroeder. 1974. Colorado.

25 *Using Educational Indicators for Program Accountability.* Michael J. Grady, Jr. September 1974. Colorado.

26 *Costs of Educational Accountability: A Maryland Exploratory Study.* November 1974. Maryland.

27 *Condition Variables in Relation to Measured Student Performance:* The Use of Indicators in Pennsylvania. November 1975. Pennsylvania.

28 *Operating an Objective-Referenced Testing Program:* Florida's Approach To Large-Scale Assessment. 1975. Florida.

NOTE Documents with ERIC reference numbers can be obtained through the usual ERIC procedures

Copies may be obtained from:

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